

BMC Service Request Management 2.2.00

Configuration Guide



June 2008



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- Order or download product documentation.
- Report a problem or ask a question.
- Subscribe to receive email notices when new product versions are released.
- Find worldwide BMC Software support center locations and contact information, including email addresses, fax numbers, and telephone numbers.

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Have the following information available so that Customer Support can begin working on your issue immediately:

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 - Product version (release number)
 - License number and password (trial or permanent)
- Operating system and environment information
 - Machine type
 - Operating system type, version, and service pack
 - System hardware configuration
 - Serial numbers
 - Related software (database, application, and communication) including type, version, and service pack or maintenance level
- Sequence of events leading to the problem
- Commands and options that you used
- Messages received (and the time and date that you received them)
 - Product error messages
 - Messages from the operating system, such as file system full
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If you have a question about your license key or password, contact Customer Support through one of the following methods:

- E-mail customer_support@bmc.com. (In the Subject line, enter SupID:<*yourSupportContractID*>, such as SupID:12345.)
- In the United States and Canada, call 800 537 1813. Outside the United States and Canada, contact your local support center for assistance.
- Submit a new issue at http://www.bmc.com/support_home.

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Preface

This guide describes how to configure the BMC Service Request Management (SRM) 2.2.00 application. This application runs on the BMC Remedy Action Request System (AR System) platform and consumes data from the BMC Atrium Configuration Management Database (CMDB).

Audience

This guide is for AR System administrators or SRM application administrators who configure the SRM application.

New icon



This guide contains the *New* icon to identify information that is new or substantially changed with version 2.2.00.

BMC SRM documentation

The following table lists the documentation available for SRM.

Unless otherwise noted, online documentation in Adobe Acrobat (PDF) format is available on product installation CDs or DVDs and on the Customer Support website (http://www.bmc.com/support_home). You can order printed documentation from the Customer Support website.

Title	Document provides	Audience
<i>BMC Service Request Management 2.2.00 Release Notes</i>	Information about new features and known issues.	Everyone
<i>BMC Service Request Management 2.2.00 Installation Guide</i>	Procedures for installing the BMC Service Request Management application.	Administrators
<i>BMC Service Request Management 2.2.00 User's Guide</i>	Procedures for using the BMC Service Request Management application.	Everyone
BMC Service Request Management 2.2.00 Help for Users	Help for using the BMC Service Request Management application.	Everyone

Title	Document provides	Audience
BMC Service Request Management 2.2.00 Configuration Help	Help for administering configuring the BMC Service Request Management application.	Administrators
<i>BMC Atrium CMDB 2.x Common Data Model Diagram</i>	Hierarchical diagram of all classes in the Common Data Model (CDM), including unique attributes and applicable relationships.	Administrators
<i>BMC Atrium CMDB 2.x Concepts and Best Practices Guide</i>	Information about CMDB concepts and best practices for planning your BMC Atrium CMDB implementation.	Executives and administrators
<i>BMC Atrium CMDB 2.x Developer's Reference Guide</i>	Information about creating API programs, C and Web Services API functions and data structures, and a list of error messages.	Administrators
<i>BMC Atrium CMDB 2.x Installation and Configuration Guide</i>	Information about installing and configuring BMC Atrium CMDB, including permissions, class definitions, reconciliation, and federation.	Administrators
<i>BMC Atrium CMDB 2.x Master Index</i>	Combined index of all books.	Everyone
<i>BMC Atrium CMDB 2.x Release Notes</i>	Information about new features and known issues.	Everyone
<i>BMC Atrium CMDB 2.x User's Guide</i>	Information about using BMC Atrium CMDB, including searching for and comparing CIs and relationships, relating CIs, viewing history, and launching federated data.	Users
<i>BMC Remedy 7.1.00 Approval Server Guide for Users and Administrators</i>	Information about installing and configuring the Approval Server, how to use the Approval Server, and understanding the approval workflow.	Administrators
<i>BMC Remedy IT Service Management 7.0 Configuration Guide</i>	Procedures for configuring the BMC Remedy IT Service Management applications.	Administrators
<i>BMC Service Level Management 7.x Configuration Guide</i>	Procedures for configuring the BMC Service Level Management application.	Administrators
<i>BMC Service Level Management 7.x Installation Guide</i>	Procedures for installing the BMC Service Level Management application.	Administrators
<i>BMC Service Level Management 7.x Release Notes</i>	Information about known issues in each release of BMC Service Level Management. Also provides a list of new features included with the application.	Everyone
<i>BMC Service Level Management 7.x User's Guide</i>	Procedures for using the BMC Service Level Management application; includes new features and overview.	Users
<i>BMC Remedy 7.0 Task Management Administrator's Guide</i>	Procedures for configuring Task Management.	Administrators

Introducing BMC Service Request Management

This section provides an overview of the BMC Service Request Management (SRM) application.

The following topics are provided:

- SRM overview (page 12)
- Configuration prerequisites (page 12)
- Customizing the application (page 12)
- Internationalization and localization (page 13)

SRM overview

BMC Service Request Management (SRM) fulfills the ITIL[®] function of the Service Desk. The Service Desk is the only function or department specifically defined within ITIL because it is critical in IT user support. The goal of the Service Desk is to provide a “single point of contact” between the IT user and the IT organization.

The Service Desk handles activities related to basic ITIL processes, such as Incident Management, Change Management, Service Level Management, and so on.

Configuration prerequisites

As the application administrator, you configure SRM to contain custom entries about the various people, groups, skills, responsibilities, and geographic locations associated with your organization.

Before you begin configuring the application, verify that the following configuration prerequisites are met:

- You must have an AR System write license (either fixed or floating) and an application license to create or modify entries in the Application Administration Console.
- You must have a basic knowledge of AR System administration tasks.

To enable you to configure SRM quickly, this guide provides a “quick start” section. You might want to configure the application quickly to test basic functionality or to perform “proof of concept” tasks.

Customizing the application

SRM is built on AR System. This enables experienced administrators, workflow developers, and consultants to extend and customize the behavior of the advanced interaction forms supplied with SRM 2.1.00 (or later) to meet the changing needs of your organization and to integrate it with other applications. BMC offers courses for beginners through advanced workflow developers. For more information, see the *BMC Service Request Management 2.2.00 Administrator's Guide*.

For more information, visit BMC education at:

<http://www.bmc.com/education/servicemgmt/>

For information about extending the functionality of SRM, access the Customer Support website at:

http://www.bmc.com/support_home

Internationalization and localization

SRM is built on AR System, which is a fully internationalized environment. This environment includes internal support for different character sets and a full suite of features that enable administrators to produce localized applications. In addition, support is provided for a locale model in which users can specify their language and formatting preferences to have the application delivered in the style that is the most useful to them. With this model, the same application can be delivered simultaneously to different users in multiple languages.

NOTE

For detailed information about localizing SRM for your environment, see the *BMC Service Request Management 2.2.00 Administrator's Guide*.

You can localize SRM in the following ways:

- You can define Navigational Categories and SRD Levels in multiple languages.
- You can define the display properties for application object templates (AOTs), process definition templates (PDTs), and service request definitions (SRDs) in multiple languages. The display properties of these object are then automatically related to each other.
- You can define Questions in different languages. The display properties of Questions (unlike, for example, AOTs) are not automatically tied to each other.
- End users can see the SRDs available in their own language.
- All the instances created from the SRD—service request, product definition instance (PDI), application object instance (AOI)—are created in the requester language.

2 Configuring and using SRM—Quick Start

This section is for anyone who quickly wants to configure and use SRM, for example, to perform “proof of concept” tasks. Configuration tasks are performed from the Application Administration Console.

NOTE

Only users with SRM Administrator permissions can configure SRM.

The following topics are provided:

- Quick Start overview (page 16)
- Defining the SRM application administrator (page 17)
- Defining SRM support staff (page 23)
- Configuring mid tier and multi-tenancy settings (page 25)
- Configuring the Mid Tier to view DVF fields (page 28)
- Deploying default SRDs (page 30)
- Requesting services in the Request Entry Console (page 33)

Quick Start overview

To get SRM 2.2.00 up and running *quickly* with a minimum of configuration, the SRM Administrator and the Service Catalog Manager must perform the following steps.

IMPORTANT

This section presupposes that you understand basic ITSM 7.x configuration, for example, you know how to log in to the IT Home page, define users in the People form, and so on.

Action	Console used
Stage 1—Standard configuration	
Perform standard configuration of your company or organization. Note: Most customers should already have performed this step. If you have, you can ignore this step, <i>except</i> for creating assignment routing for SRM. For more information, see the “Performing standard configuration” on page 175 and “Creating assignment routing for SRM” on page 191.	Application Administration Console > Standard Configuration tab
Stage 2—General SRM configuration	
Define the SRM Administrator.	Application Administration Console > Standard Configuration tab > People
Define the SRM support staff with appropriate SRM privileges.	Application Administration Console > Standard Configuration tab > People
Configure the SRM Application Settings form with the Mid Tier path.	Service Request Management > Advanced > Application Settings
Verify that the Mid Tier URL needed to identify the DVF components is correct. This step is necessary to make sure that, for example, the Request Entry Console displays the navigational categories correctly.	AR System Administration Console > System > General > Server Information
Deploy SRDs	
Deploy one of the default SRDs installed with SRM 2.2.00.	Service Catalog Manager Console
View the SRD in the Request Entry Console	
Log in to the Request Entry Console and view the SRD in the Request Entry Console. You can also browse or search for it.	Request Entry Console

If you perform the *minimum* level of SRM configuration described in this section, the Service Catalog Manager can successfully deploy one of the default SRDs. After the SRD is online, it automatically appears in the Request Entry Console.

SRM end users can then search for available services, and then submit and view their requests.

Defining the SRM application administrator

The SRM Administrator is the person responsible for configuring SRM. SRM is installed with a default application administrator (appadmin), which you can use to start configuring the applications.

You can assign SRM administration permissions to an existing user account, or you can create a new user account and assign application administration permissions. For detailed information on SRM permissions, see the *BMC Service Request Management 2.2.00 Configuration Guide*.

The following procedure describes the minimum number of entries that you need to make to enable the SRM Administrator to configure the SRM application. You should modify the SRM Administrator entry created here by adding information when you are configuring your users, as described in “Defining SRM support staff” on page 23.

IMPORTANT

Always configure people by opening the People form from the Application Administration Console. Information that you add or modify on the People form is automatically updated to the AR System User form, but information updated on the User form is not updated to the People form.

► **To define the SRM application administrator**

NOTE

The SRM application administrator must have an AR System write license. An application license to create or modify entries in the Application Administration Console is also required. You can log on as appadmin to define the application administrator.

- 1 Log in to the server as the appadmin user.
- 2 On the Standard Configuration tab of the Application Administration Console, select the company for which you want to define the SRM Administrator.

- 3 Click the Create link next to People.
The People form appears.

Figure 2-1: People form completed for support staff

The screenshot shows the 'People' form in the BMC Software interface. The form is titled 'People (kahlua)' and has a 'Help' button. It is divided into several sections: 'Personal Information' (First Name, Middle Name, Last Name, Client Type, Contact Type), 'Organization Information' (Company, Organization, Department), 'Location Information' (Site, Site Address), 'Login/Access Details' (Login ID, Password), 'Support Groups' (tabbed view), 'Licensing Preferences' (License Type, Full Text License Type), 'Application Permissions' (Permission Group), and 'Access Restrictions' (Access Restriction). A callout box points to the 'Support Staff*' dropdown menu, which is set to 'Yes'. The text in the callout box reads: 'When you select Yes for Support staff, the Support Groups tab appears.'

Except where noted, fields on this dialog box can be completed similarly for both support staff and non-support staff.

- 4 Enter your email address.

NOTE
The default notification method for SRM is email.

- 5 For the SRM Administrator (and all SRM support staff), select Yes in the Support Staff field.

The Support Groups tab appears. For the SRM Administrator and all support staff, you must complete the Login/Access Details tab and the Support Groups tab.

- 6 Give the person the appropriate SRM Administrator permissions.
 - a In the Application Permissions area of the Login/Access Details tab, click Update Permission Groups.
The Permission Group dialog box appears.

Figure 2-2: Permission Group dialog box

Permission Groups Update (kahlua)

Permission Group

Permission Group*: Work Order Config

License Type: Not Applicable

Defines the work order rules and template. Requires the Work Order Config permission.

Add/Modify Clear

Permission Group	License Type
Administrator	Not Applicable
Approval Admin	Not Applicable
ASE-Administrator	Not Applicable
Config Categorization Admin	Not Applicable
Config Group Mapping Admin	Not Applicable
Contact Location Admin	Not Applicable
Contact Organization Admin	Not Applicable
Entitlement Administrator	Not Applicable
Licensing	Not Applicable
Notification Admin	Not Applicable
SRM Administrator	Not Applicable

Delete

Close

b In the Permission Group field, select a permission group to add (for example, SRM Administrator).

- Foundation > ASE-Administrator
- Foundation > Config Categorization Admin
- Foundation > Config Group Mapping Admin
- Foundation > Contact Location Admin
- Foundation > Contact Organization Admin
- Foundation > Licensing
- Foundation > Notification Admin
- Foundation > Approval Admin
- Request > Entitlement Administrator
- Request > SRM Administrator
- Request > Work Order Config

For more information about permissions, see the *BMC Service Request Management 2.2.00 Configuration Guide*.

- c If required, select a license type of Fixed or Floating.
- d Click Add/Modify for each permission group.

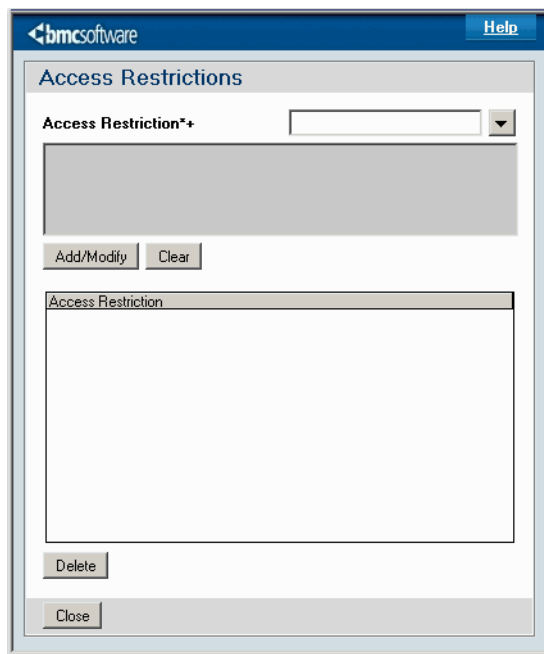
- e Add any other needed permission groups.
 - f When you finish adding permission groups, click Close.
- 7 If you are using the Company field to restrict access to specific companies, complete the following steps to give the SRM Administrator access to data within the applications by assigning the administrator to specific companies. Otherwise, select Yes in the Unrestricted Access field (the default) on the Login/Access Details tab of the People form.

IMPORTANT

To give an individual access to information in SRM, you must give the individual access to specified companies or select Yes in the Unrestricted Access field.

- a In the Access Restrictions area, click Update Access Restrictions.
The Access Restrictions dialog box appears.

Figure 2-3: Access Restrictions dialog box



- b In the Access Restriction field, select a company for which to add access to the person.
- c Click Add/Modify and then Close.

- 8 Relate the person to at least one support group:
 - a Click the Support Groups tab.

Figure 2-4: People form—Support Groups tab

Company	Support Organization	Support Group	Association Role	Availability	Default
My Company	IT Support Org	Customer Support	Member	Yes	Yes

Update Support Groups and Roles

- b Click Update Support Groups and Roles.

The Update Support Group Memberships and Roles form appears.

Figure 2-5: Update Support Group Memberships and Roles form

Update Support Group Memberships and Roles

Support Group Update | Functional Role Update

Add Support Group Relationship

Company* My Company

Support Organization* IT Support Org

Support Group*+ Customer Support

Relationship Role* Member

Add Clear

Current Support Group Relationship[s]

Company	Support Organization	Support Group Name	Relationship Role	Availability	Default
---------	----------------------	--------------------	-------------------	--------------	---------

Set to Default Make Associate Member Mark Unavailable Delete

Close

- c In the Add Support Group Relationship area, select the Company, Support Organization, Support Group, and Relationship Role.

The relationship roles are Member and Associate Member. These values are informational only. *Member* means that the person belongs to the support group. *Associate Member* means that the person has access to modify requests assigned to that support group. Click Make Associate Member or Make Member to change the relationship role.

- d Click Add.
A support person can belong to more than one support group. To select the primary support group, select the support group, and then click Set to Default.
 - e To make the person unavailable for assignment such as for change requests or incidents, click Make Unavailable for each support group to which the person is related.
- 9 Click the Functional Role Update tab.

Figure 2-6: Function Role Update tab

The screenshot shows a web-based interface for managing support group roles. The title bar says 'bmcsoftware' and 'Help'. The main title is 'Update Support Group Memberships and Roles'. There are two tabs: 'Support Group Update' and 'Functional Role Update', with the latter being active. Below the tabs is a section titled 'Add Support Group Functional Role'. It contains four dropdown menus: 'Company' (selected: MM Corporation), 'Support Organization' (selected: Information Technology), 'Support Group Name' (selected: Network Support), and 'Functional Role' (selected: SRD Approver). To the right of these is a text box labeled 'SRD functional role for group approval'. Below the dropdowns are 'Add' and 'Clear' buttons. Below this section is a table titled 'Current Support Group Functional Role(s)'. The table has five columns: 'Company', 'Support Organization', 'Support Group Name', 'Functional Role', and 'Availability'. It contains one row with the values: 'MM Corporation', 'Information Technology', 'Network Support', 'Request Approver', and 'Yes'. Below the table are 'Mark Unavailable' and 'Delete' buttons. At the bottom of the dialog is a 'Close' button.

Company	Support Organization	Support Group Name	Functional Role	Availability
MM Corporation	Information Technology	Network Support	Request Approver	Yes

You can use this tab to assign SRM functional roles to people within support groups. Functional roles extend access granted by permissions groups, but only for specific support groups that are used within the application. For example, someone might be a member of two support groups but is a SRD Approver for only one.

- 10 To add an SRM functional role, complete the following steps:
- a In the Add Support Group Functional Role area, select the Company, Support Organization, and Support Group Name.
Selections in lists for the Company, Support Organization, and Support Group Name fields on this tab appear only if support groups have been related to the person on the Support Group Update tab.
 - b Select a functional role.
 - c Click Add.
The functional role appears in the table at the bottom of the dialog box. You can continue to add functional roles.

- 11 Click Close.
- 12 In the People form, click Add.
- 13 You must confirm this person's password.
You can continue to add people records.
- 14 When you are finished adding people records, click Close.

Defining SRM support staff

IMPORTANT

In this section, you should create one user with Request Catalog Manager permissions and one end user with Service Request User permissions. You will need these users later, when the Service Catalog Manager deploys a default SRD, and when the end user requests the service in the Request Entry Console.

You can create people records with standard settings for SRM support staff from the Standard Configuration tab of the Application Administration Console.

You must set up a login ID and password for anyone with access to the application, aside from guest access. People information also includes each person's company, organization, business and home addresses, desk location, support groups, and selected additional information. For SRM, you create records for each member of the support staff. The SRM Administrator must correctly configure people in your company with the following SRM permission groups:

- Service Request User
- Business Manager
- Entitlement Administrator
- Request Catalog Manager

NOTE

The terms "Request Catalog Manager" and "Service Catalog Manager" are synonymous.

- Work Order Config
- Work Order Master

For detailed information on permissions and roles, see the *BMC Service Request Management 2.2.00 Configuration Guide*.

► **To create support staff records**

- 1 Log in to the server as the SRM Administrator.
- 2 Open the Application Administration Console.
- 3 From the Standard Configuration tab, select the appropriate company.

- 4 To determine whether this person has already been added as a user, complete the following tasks:
 - a Click the View link next to Step 4 People.
The People form appears.
 - b Search for the user to add as a member of the SRM support staff, for example, the user that you want to be the Service Catalog Manager.
 - c Select the person to define as a member of the SRM support staff.
Information for the selected user appears in the People form.
- 5 If this person has not yet been added as a user, complete the information for this person, and then continue with the next step in this procedure.

NOTE

When defining the People records for your support staff, remember that the default notification method for SRM is email.

- 6 Click the Login/Access Details tab.
 - a In the Unrestricted Access field, select Yes.
 - b In the Application Permission area, click Update Permission Groups. The Permission Group dialog box appears.
 - c In the Permission Group field, select each appropriate permission group to add.
You must assign the Service Catalog Manager to the Request Catalog Manager permission group. Other useful permissions might be Work Order Master or Task Manager.
 - d Select the license type if licensing applies to that permission group.
 - e Click Add/Modify for each permission group.
- 7 If you are using the Company field to restrict access to specific companies, give the Service Catalog Manager access to data within the applications by assigning the manager to specific companies. Otherwise, select Yes in the Unrestricted Access field on the Login/Access Details tab of the People form.
- 8 Add the Service Catalog Manager to the membership of at least one support group.
- 9 Add the SRD Approver functional role to the Service Catalog Manager.
- 10 Add any remaining information needed to create the support person.
- 11 Click Close.
The person's information is stored in the AR System User form and the application People form.
- 12 Log in to SRM with the new users.
Make sure the SRM users can access the ITSM Home page. Then verify that the users can view the correct SRM Consoles. For example, a user with Request Catalog Manager permissions should be able to see *only* the Request Entry Console and the Service Request Coordinator Console.

Configuring mid tier and multi-tenancy settings

The SRM Application Settings form is used to configure the Mid Tier path. This path must be set correctly, so that you can view the data visualization fields (DVF) in SRM.

In addition, this form is used to configure multi-tenancy settings for the Request Entry console. Use this form to determine if your organization supports multi-tenancy or usage by a single default company.

You can also use this form to determine if your organization allows unknown users to access the Request Entry console to submit service requests, or whether your organization will use the Request Entry console as the front-end application. (For information, see “Allowing unknown users access to SRM” on page 27.)

IMPORTANT

Multi-tenancy is how access control to data is enforced in Service Request Management. For example, when you create an SRD, you either specify which company it belongs to or you designate it as a “global” SRD. As a result, if the SRD is attached to My Company, only users who belong to My Company can access it. But if the SRD is global, then you are allowing any user to see it, regardless of what company they belong to.

► **To configure mid tier and multi-tenancy settings**

- 1 Log in to the server as an SRM Administrator.
- 2 From the Application Administration Console, click the Custom Configuration tab.
- 3 From the Application Settings list, choose Service Request Management > Advanced > Application Settings, and then click Open.

The SRM Application Settings form appears.

Figure 2-7: SRM Application Settings form

Tenancy Mode* Multi-Tenancy

Company

Tenancy mode and company are defined in the System Settings form. They must be defined for Single-Tenancy to enable Unknown Users. Select Yes to allow guest users to access the Request Entry console. If you allow guest (unknown) users, enter the default login information. If you select No, make sure that your users have records in the People form with the required AR Login information.

Allow Unknown Users* No

Login ID +

Last Name

First Name

Full Name

Enter the default path of the Mid Tier using (ex, http://255.255.255.255/arsys) format.

Mid Tier Path http://sm22kd-vm-01.eng.remedy.com

Once the "Mid Tier Path" field value (above) has been set, saving and reopening your current entry will display the values in the fields below. They will be set by server side workflow. Once the values display, proceed with the following:

* MidTier configuration: Access the MidTier Configuration Tool with the following URL, where <Mid Tier Path> is the value entered above:
 <Mid Tier Path>/shared/config/config.jsp

On the "AR Server Settings" page, add a server, using the AR Server name displayed below in the "AR Server Value For MidTier Configuration" field.

On the "General Settings" page, set the "Data Visualization Module Server(s)" field to the name of the server just added.

* Admin Tool configuration: Set the Default Web Path on the Advanced Tab of the Server Information dialog to the Mid Tier Path value above.

Once the above configuration has been completed, the URL specified in the "URL To Service Request Console" field below can be used to access the Request Entry console from the web. If the console displays, the configuration was completed successfully.

* User tool server should match the fully-qualified domain name shown in the URL to Request Entry Console field

AR Server Value For MidTier Configuration SRM22-vm-01.eng.remedy.com

URL To Request Entry console http://sm22kd-vm-01.eng.remedy.com/arsys/forms/SRM22-vm-01.eng.remedy.com/SRS:ServiceRequestEntryConsole

- 4 If Single-Tenancy is displayed in the Tenancy Mode field, specify whether to allow guest users to access the Request Entry console, as follows:
 - a In the Allow Unknown Users field, select Yes or No.
 - b If you select Yes, specify the proxy login information.

NOTE

If Multi-Tenancy is displayed in the Tenancy Mode field, your organization uses the Company field for access control. You cannot allow guest users to access the system; only users registered in the People form are allowed access. For information, see "Allowing unknown users access to SRM" on page 27.

- 5 In the Mid Tier Path field, enter the default path of the BMC Remedy mid tier using the fully-qualified domain name (FQDN) format, for example:

```
http://255.255.255.255:8080/arsys
http://ccm-five1-vm2.labs.acme.com/arsys
http://chardonnay.labs.acme.com:8080/arsys
```

IMPORTANT

Make sure the FQDN you enter here matches *exactly* the mid tier settings you enter in "Configuring the Mid Tier to view DVF fields" on page 28.

- 6 Click Save.

Allowing unknown users access to SRM

The Request Management Application Settings form is used if your organization allows unknown users to access the Request Entry Console to submit service requests.

Users are considered to be unknown users if they have not been given login information, even if they have been defined in the People form.

IMPORTANT

For unknown users who do not have an AR System login to be able to access the Request Entry Console, the AR System server option “Allow Guest User” option must be turned on. The Allow Guest User option is available only when the server is set to single-tenancy mode. Also the AR Submitter locked mode must be enabled for users with a read-only license to respond to surveys. The Service Request Management application must also set up a default People record with a valid AR System login to be used for unknown users.

To give unknown users access to the Request Entry Console:

- Select the AR System Allow Guest User option.
- Enable AR Submitter locked mode so users with a read-only license can cancel requests, add requests to the cart, and respond to surveys.
- Set the tenancy mode to Single-Tenancy and add a company name.
- Set the Allow Unknown Users option to Yes and add login information.

For information about setting the AR System options, see the *BMC Remedy Action Request System 7.1.00 Configuring* guide and the *BMC Remedy IT Service Management 7.0 Configuration Guide*.

IMPORTANT

For unknown users who *have* an AR System login and no People record, some organizations might not want guest users to access their systems. In this situation, the Allow Guest User option does not need to be enabled.

Configuring the Mid Tier to view DVF fields

To view the data visualization fields (DVF) in SRM, you must properly configure the BMC Remedy Mid Tier.

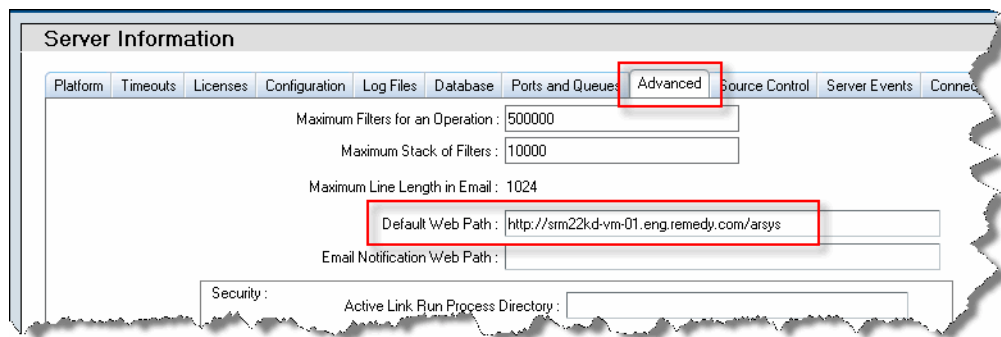
NOTE

You must perform this task even if you are using BMC Remedy User Tool.

► To configure the Mid Tier to view DVF fields

- 1 Log in to the AR System server with a browser or BMC Remedy User Tool.
- 2 From the IT Home Page, open the AR System Administration Console.
- 3 Choose System > General > Server Information.
- 4 In the Server Information window, click the Advanced tab.

Figure 2-8: Server Information window—Advanced tab



- 5 In the Default Web Path field, enter the mid tier URL.

The format is `http://<mid-tier-host>[:port]/<context_path>`. The default value for `<context_path>` is `arsys`.

For example:

`http://ccm-five1-vm2.labs.bmc.com/arsys`

Specify the port only if you are not using the default port number of 80. Make sure you use the FQDN.

For status icons in the Service Categories and the Submitted Requests areas to function correctly, the URL used to access the Request Entry console must contain the current AR System server for the mid tier, which is the value in the `$$SERVER$` variable.

- 6 Click OK to save to save your settings.
- 7 Open the BMC Remedy Mid Tier Configuration Tool:
`http://<mid-tier-host>/arsys/shared/config/config.jsp`
- 8 Select General Settings.



- 9 Enter the AR Server name in the Data Visualization Module Server field.

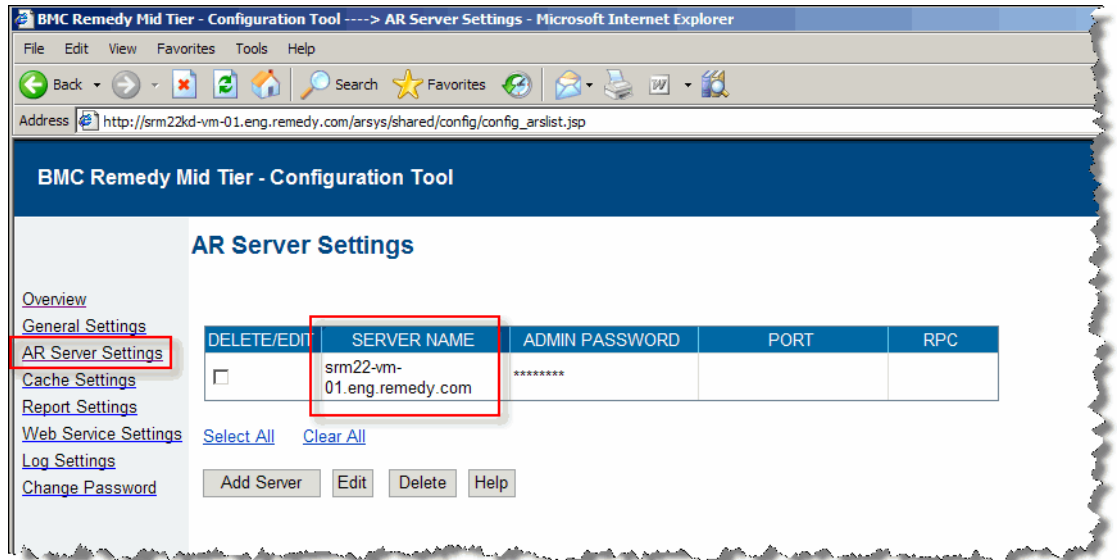
You should configure the Data Visualization Module on the mid tier to use only one server.

- 10 Select AR Server Settings.

- 11 Add the FQDN of the AR System server for the mid tier.

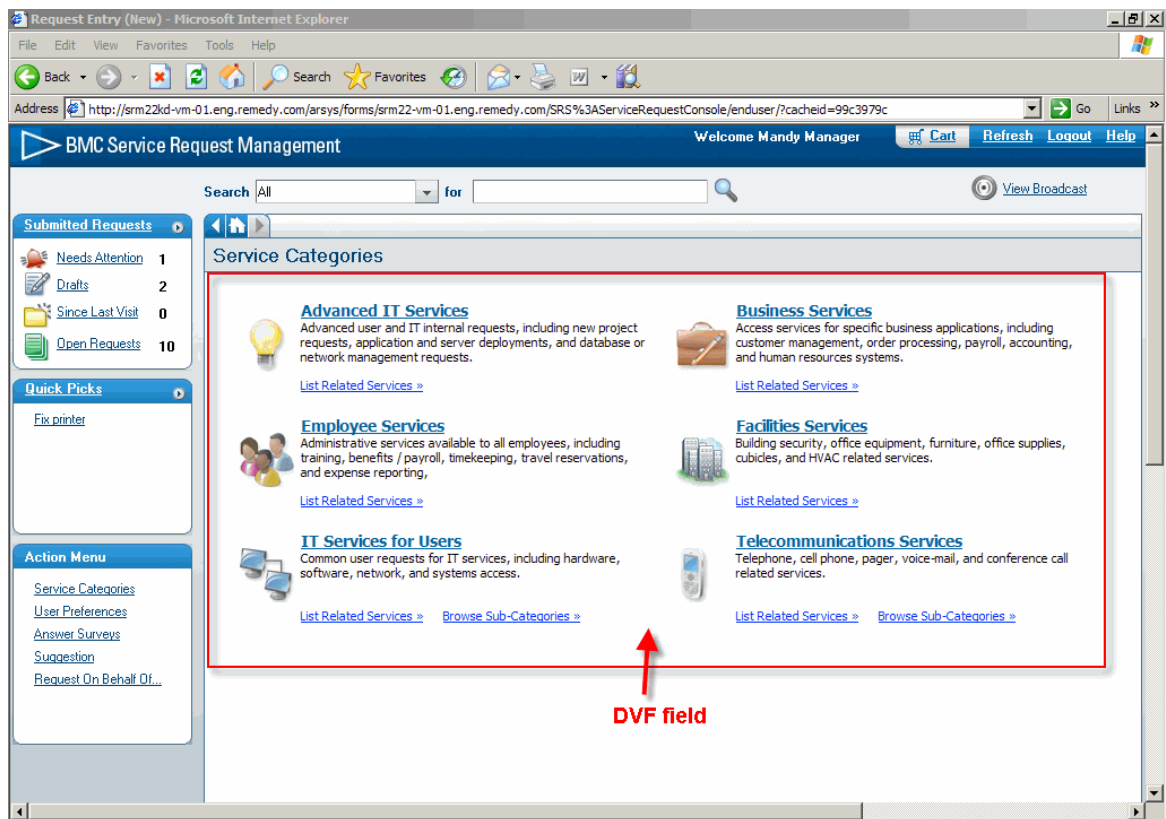
For example: `ccm-five1-vm2.labs.bmc.com`

Figure 2-9: AR System server setting in the BMC Remedy mid tier



- 12 Save your changes.
- 13 Log in to the server with your web browser, and then open the IT Home Page.
- 14 In the left navigation pane, click the Request Entry link under Service Request Management.
- 15 If you correctly configured the Mid Tier, the Request Entry Console appears.
You should see all the default Service Categories displayed in the main DVF field.

Figure 2-10: Request Entry Console

**NOTE**

You are finished with the SRM Administrator tasks. The Service Catalog Manager takes over.

Deploying default SRDs

Three SRDs have been provided for you by default, when you installed the SRM sample data. You are going to deploy one of these SRDs, as part of the SRM “proof of concept” tasks. For detailed information on working with SRDs, see the *BMC Service Request Management 2.2.00 User's Guide*.

NOTE

To complete this example, you might need to create employees who are part of the default My Company.

► To deploy default SRDs

- 1 Log in to your server as a Service Catalog Manager.
- 2 Open the Service Catalog Manager Console.

Figure 2-11: Service Catalog Manager Console

BMC SERVICE REQUEST MANAGEMENT
Service Catalog Manager Console

Welcome, John SRM

Close Help

bmcsoftware

Company

Request Definition View: Myself - John SRM

Refresh

Search Criteria

Locale: [Dropdown]
Find: [Text Box]
Level: [Dropdown]
Status: [Dropdown]
Offline: ☒ All ☐ Online ☐ Offline

☐ Title ☐ Keywords
☐ Description ☐ Navigational Categories

Search Clear Default

Search Results

Title	Status	Request Type	Start	End

Details

View **Create** Delete Approve Reject Make Inactive

- 3 Click the Create button.

The Service Request Definition form appears in New mode.

- 4 Press F3 to put the Service Request Definition form into Search mode.

- 5 Search for the On-board Employee SRD.

The On-Board Employee SRD appears.

Figure 2-12: Default On-Board Employee SRD displayed in Service Request Definition form

The screenshot shows the BMC Service Request Management (SRM) interface in a Microsoft Internet Explorer browser. The browser address bar shows the URL: <http://lmb0:8080/arsys/forms/srm-jap-vm1.labs.bmc.com/SRD%3AServiceRequestDefinition/Support/?cacheid=5d0929b9>. The page title is "Service Request Definition (Modify) - Microsoft Internet Explorer".

The main form area is titled "BMC SERVICE REQUEST MANAGEMENT Service Request Definition". It includes a "Current mode: Modify" bar with buttons for "Save", "New search", "New request", "Modify all", "Advanced search", "Clear", "Set to defaults", "Status history", and "Help Home".

The form fields are organized into sections:

- Service Request Definition ID:** SRD00000000000002
- Version:** Pending
- Company:** My Company
- Title:** On-board Employee
- Description:** Prepare for a new employee, includes office, computer, and security setup.
- Keywords:** new office badge
- Status:** Draft
- Status Reason:** (empty)
- Instructions:** (empty)
- Navigation Categories:**
 - Category 1: Business Services
 - Category 2: (empty)
 - Category 3: (empty)
- SRD Details:**
 - Request Type: Standard
 - Advanced Interface Form: (empty)
 - Process Template: On-board Employee
 - Expected Cost: 0.00 USD
 - Price: 0.00 USD
 - Turnaround Time: 10 Days
 - Account Number: (empty)
 - System Request: Left Navigation
 - Business Service: (empty)
- Effective Dates and Times:**
 - Start Date: 1/1/2007 12:00:00 AM
 - End Date: (empty)
- Customer:**
 - First Name: App
 - Last Name: Admin
- Request Catalog Manager:**
 - Company: My Company
 - Name: App Admin
- Attachment:**

File Name	Max Size	Attach Label
Attachment Field		

The left navigation pane shows the "Functions" tab selected, with options: "Change Image", "Show/Hide Fields", "Manage Notifications", "Reports", and "View Audit Log". The "Other Applications" tab is also visible.

- In the left navigation pane, click the Functions and Other Applications tabs to display their features.

For example, you can modify the default image of the SRD by clicking Change Image.

- In the Status field, change the status of the SRD from Draft to Request for Approval.

TIP

Remember the search terms ("new office badge") available for end users in the Keyword field. You will use them later, when you open the SRD in the Request Entry Console.

- Save your changes.

The Take Offline button and the green stoplight appear in the Service Request Definition form above the Status field.

Figure 2-13: Online button—SRD in Deployed state

The green stoplight alerts you that the SRD has been deployed *and* is in the correct date range.

The SRD record is now available online to users from the catalog. End users can now browse or search for the SRD in the Request Entry Console.

NOTE

You are finished with the Service Catalog Manager tasks. The end user role takes over.

Requesting services in the Request Entry Console

The Request Entry Console serves as the front end for the service catalog. It features a user-friendly interface that allows users to search for available services, and then submit and view their requests.

You use the Request Entry Console to request a service. The console is the entry point for users to create, view, update, or cancel their own service requests. After you submit the service request information, that information becomes populated in the Request Entry Console itself. You can view the service request record, and enter more details or modify entries directly from the Request Entry Console.

For detailed information on using the Request Entry Console, see the *BMC Service Request Management 2.2.00 User's Guide*.

► To request services in the Request Entry Console

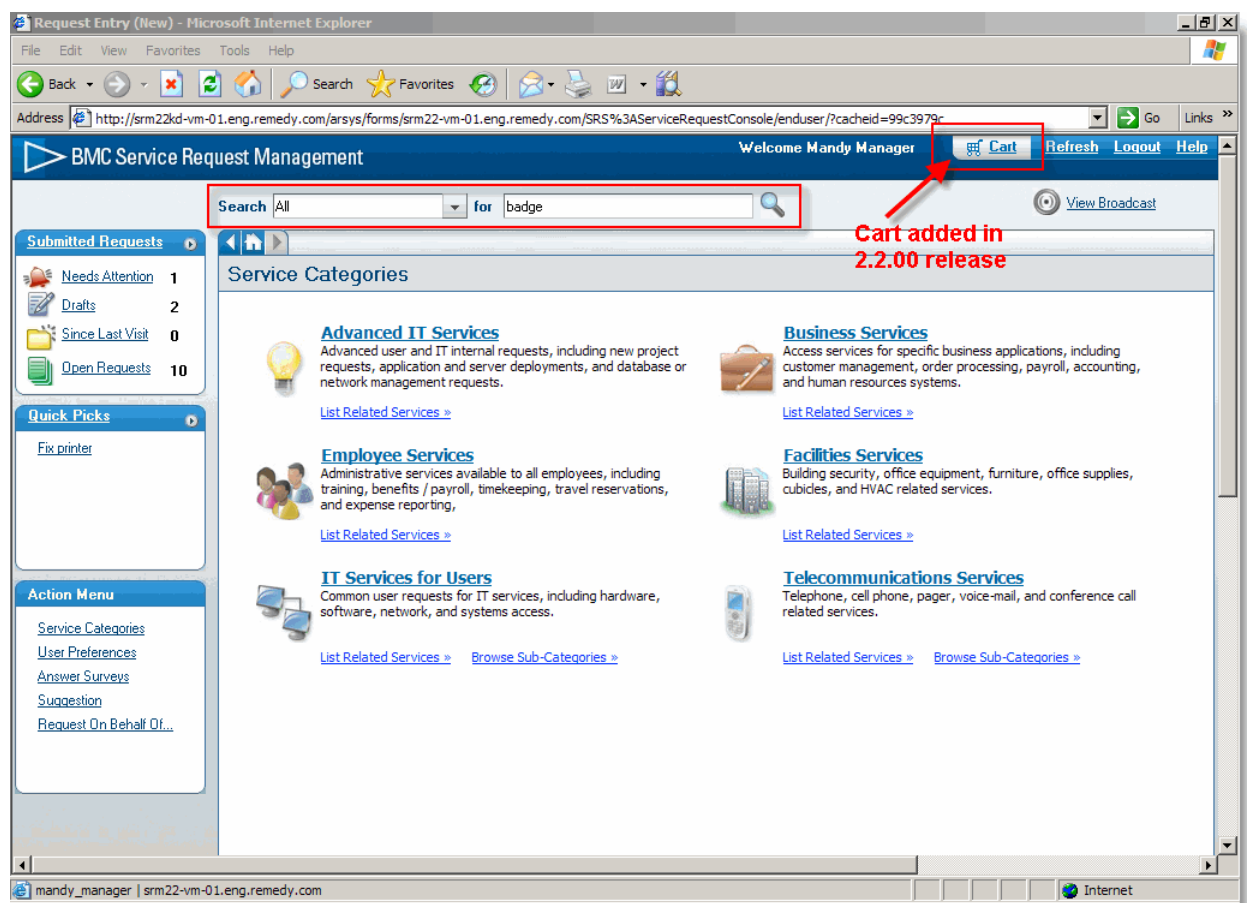
- 1 Log in to your server as a Service Request User.

For more information about configuring user permissions in SRM, see the instructions for defining SRM support staff in the *BMC Service Request Management 2.2.00 Configuration Guide*.

- 2 Open the Request Entry Console.

The Request Entry Console appears.

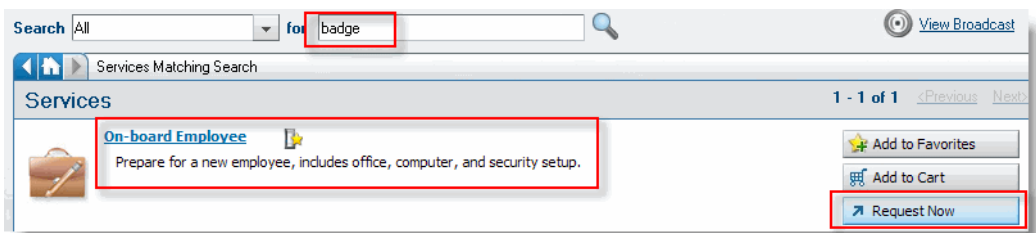
Figure 2-14: Request Entry console



- 3 Search for the SRD that was just deployed by entering one or more of the search terms (“badge”) and then pressing RETURN.

Any services matching the search criteria are displayed in the Services area of the Request Entry Console, for example, the On-board Employee SRD.

Figure 2-15: Matching services displayed in Request Entry Console



- 4 Request the On-board Employee service.

The Provide Information window appears in the Request Entry Console.

Figure 2-16: Provide Information stage when requesting a service

Request Entry (New) - Microsoft Internet Explorer

Address: <http://srm22kd-vm-01.eng.remedy.com/arsys/forms/srm22-vm-01.eng.remedy.com/SRS%3AServiceRequestConsole/enduser/?cacheid=99c3979c>

BMC Service Request Management Welcome Mandy Manager [Cart](#) [Refresh](#) [Logout](#) [Help](#)

Search: All for badge [View Broadcast](#)

Submitted Requests

- Needs Attention: 1
- Drafts: 2
- Since Last Visit: 0
- Open Requests: 10

Quick Picks

- Fix printer

Action Menu

- [Service Categories](#)
- [User Preferences](#)
- [Answer Surveys](#)
- [Suggestion](#)
- [Request On Behalf Of...](#)

Services Matching Search >> Provide Information

Provide Information

Requester: [Edit...](#)

Name: Mandy Manager
Phone: ###
Email: mandy@bmc.com

Request Name: On-board Employee

Required Date:

Expected Date: 4/14/2008 9:35:51 AM

Quantity: 1

Extended Price: 1,000.00 USD

Special instructions (add attachment if necessary)

Need badge for a new employee.

New employee ID number: SVL-2222

New employee name: Fred User

New employee office number: SVL2.1122

Manager's name: Mandy Manager

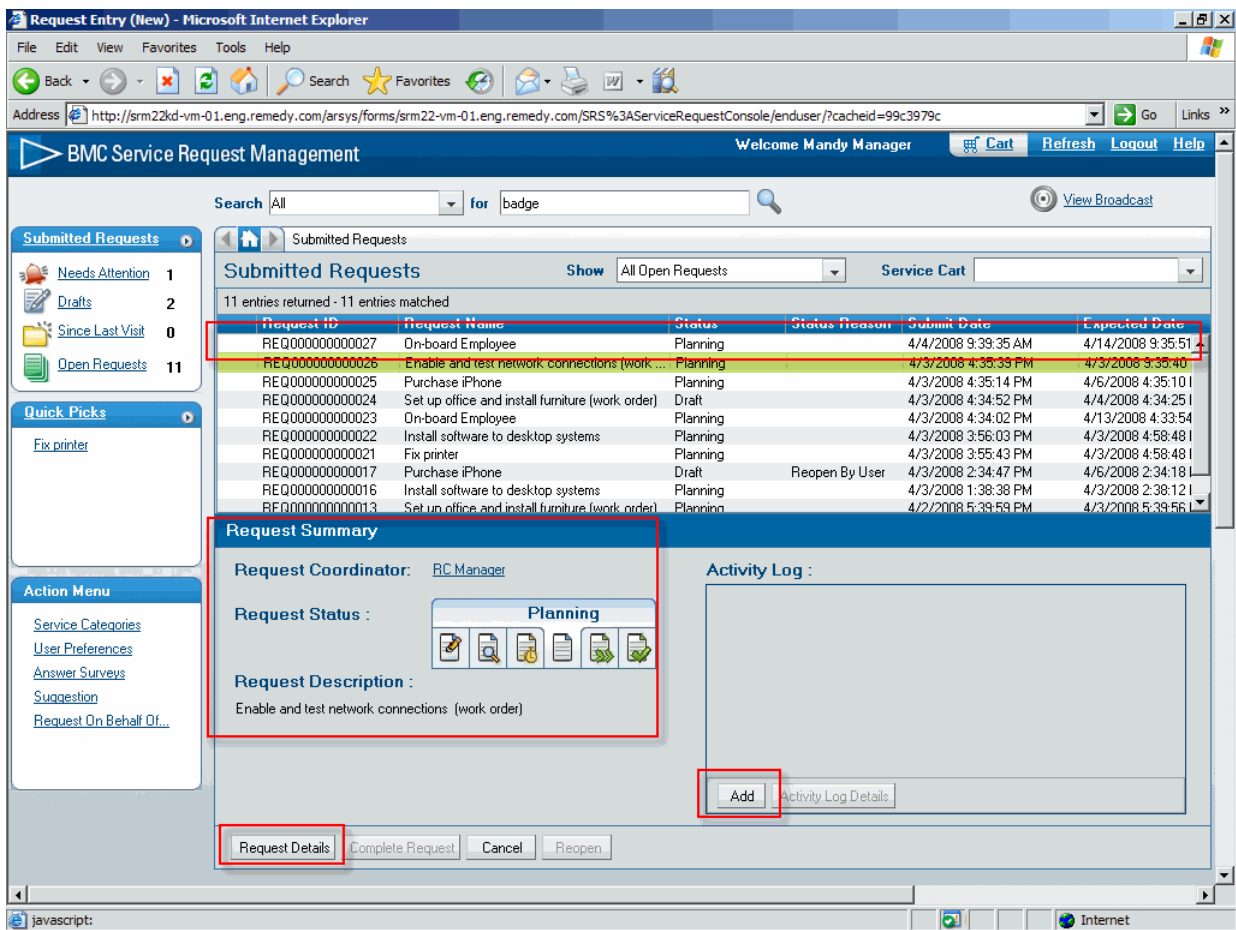
[Add Attachment](#) [Summary](#) [Add To Cart](#) [Save As Draft](#) [Submit](#)

mandy_manager | srm22-vm-01.eng.remedy.com

- 5 Enter required date, name, special instructions, and so on, into the form.
- 6 Submit the request.

You are prompted that a service request was created.

Figure 2-17: Submitted requests displayed in the Request Entry Console

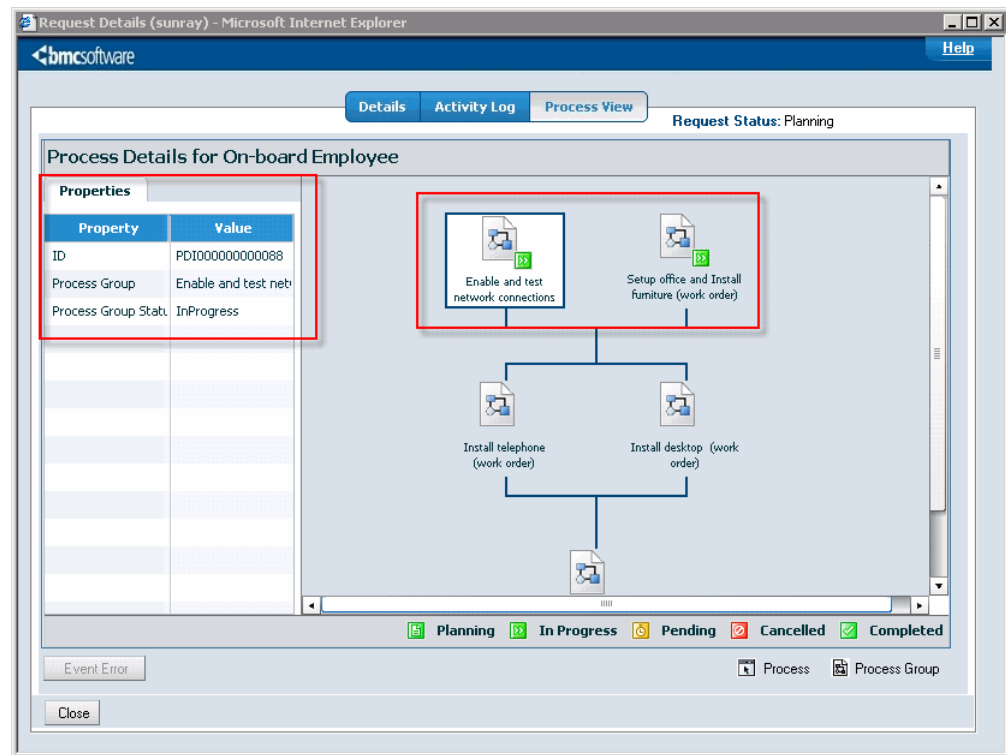


Your service request is then displayed in the list of submitted requests.

- 7 From this window, end users can perform the following actions:
 - View the specific details of the request, what stage it is in (for example, Planning), its service request coordinator (if one is assigned), and so on.
 - Add activity information to the request.
 - View the states of your requests (for example, Draft), all open requests, and so on.
 - View broadcasts.
 - Define user preferences.
- 8 Track the progress as the back-end fulfillment providers work on the request by clicking Request Details.

As the request is being worked on, it moves through various states, for example, Waiting Approval. This information is updated in real-time in the Request Entry Console.

Figure 2-18: Viewing request details

**NOTE**

You cannot see this window if Adobe Flash Player is not installed on your client system.

As an SRM end user, you can view various details about the service request. You can review important summary information (for example, REQ000000000100), any work performed, or the underlying process details in the back-end fulfillments applications.

- 9 Close the Request Details dialog box when you are finished.

You have finished the SRM 2.2.00 quick start. From start to finish, you have accomplished the following tasks:

- Installed SRM 2.2.00.
- Performed mandatory configuration tasks (for example, configured the mid tier, created your support staff, and so on).
- Deployed one of the default SRDs installed as part of the sample data.
- Searched for the SRD in the Request Entry Console and created a service request.

You are now ready to start working with basic and advanced SRM functionality.

- 10 Start with the basic configuration tasks in the *BMC Service Request Management 2.2.00 Configuration Guide*.

Follow the steps in the basic configuration overview carefully.

Basic SRM configuration tasks

This section is for the BMC Service Request Management (SRM) Administrator who wants to configure SRM, for example, to test basic functionality. Configuration tasks are performed from the Application Administration Console.

NOTE

Only users with SRM Administrator permissions can configure SRM.

The following topics are provided:

- Basic configuration overview (page 40)
- Creating application templates (page 43)
- Defining application object templates (AOTs) (page 52)
- Configuring navigational categories (page 57)
- Configuring service request definitions (page 66)
- Miscellaneous configuration (page 78)
- Modifying work order templates (page 84)
- Configuring work order rules (page 85)
- Configuring service targets for SRM (page 87)

Basic configuration overview

To perform the basic level of SRM 2.2.00 configuration, the SRM Administrator must perform the following steps.

IMPORTANT

This section presupposes that you understand basic ITSM 7.x configuration, for example, you know how to log in to the IT Home page, define users in the People form, and so on.

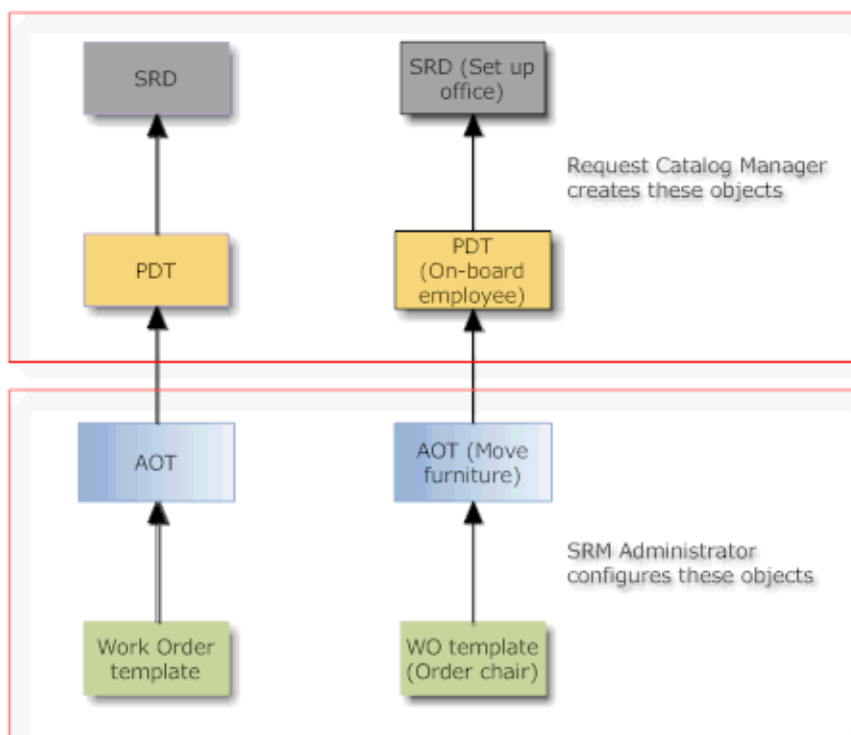
Action	Menu item	See the section
Stage 3—Configuring SRM building blocks		
Create application templates with pre-set values.	Service Request Management > Work Order > Work Order Template If other ITSM 7.0 applications are installed: Change Management > Template > Template Incident Management > Template > Template	<ul style="list-style-type: none"> ■ “Creating application templates” on page 43. ■ “Configuring work order templates” on page 45. ■ “Creating change and incident templates” on page 51.
Define the application object template. This step also includes registering new application templates and associating target data with the Application Object Template (AOT).	Service Request Management > Application Configuration > Define Application Object Template	“Defining application object templates (AOTs)” on page 52.
Stage 4—Configuring navigational categories		
Create navigational categories.	Service Request Management > Navigational Categories > Navigation Categories	“Configuring navigational categories” on page 57.
Modify descriptions and images associated with Browse for Service Details. This step displays your navigational categories in the Request Entry console.	Service Request Management > Request Entry Management > Browse for Service Details	“Defining Browse for Service details” on page 61.
View, modify, or create images.	Service Request Management > Request Entry Management > Service Request Image Configuration	“Configuring service request image definitions” on page 64.

Action	Menu item	See the section
Stage 5—SRD configuration		
Define default behavior of SRDs.	Service Request Management > Advanced > Service Request Definition Settings	“Configuring navigational categories” on page 57.
Define the questions to use with SRDs.	Service Request Management > Application Configuration > Define Questions Library	<ul style="list-style-type: none"> ■ “Defining questions to use with SRDs” on page 67 ■ “Defining the Questions Library entries” on page 68.
Define SRD levels.	Service Request Management > SRD Level > SRD Level	“Defining SRD levels” on page 71
Relate images to SRDs displayed in the Request Entry console.	Service Request Management > Request Entry Management > Service Request Definition Image Management	“Defining Browse for Service details” on page 61.
Configure survey questions for requesters.	Service Request Management > Advanced > Survey Configuration	“Configuring survey questions” on page 75.
Stage 6—Miscellaneous configuration		
Define default behavior for service requests.	Service Request Management > Advanced > Rules	“Defining behavior rules for surveys” on page 78.
View or modify HTML definitions.	Service Request Management > Advanced > Service Request HTML Configuration	“Configuring Service Request HTML definitions” on page 79.
Updates the default Preference record for the Request Entry console.	Service Request Management > Request Entry Management > Default Console Preference	“Defining default Request Entry console preferences” on page 81
View, modify, or create search exclusions.	Service Request Management > Request Entry Management > Service Request Search Exclusion String	“Configuring service request query exclusions” on page 83.
Stage 7—Configure work order templates and rules		
Modifying or deleting work order templates.	Service Request Management > Work Order > Work Order Templates	“Modifying work order templates” on page 84
Configure work order rules.	Service Request Management > Work Order > Rules	“Configuring work order rules” on page 85.
Stage 8—Configure service target defaults (applies only if BMC Service Level Management 7.x is installed)		
Modify default service target templates.	Service Request Management > Service Level Management > Service Target Defaults	“Configuring service targets for SRM” on page 87.
Stage 9—Configure approval process and mappings		
Define approvals for each phase in the business process for an organization company or category.	Foundation > Advanced Options > Approval Process Configuration	“Setting up approval process configuration records for your company” on page 109.
Map the SRM approval processes to individuals and groups for an organization company.	Service Request Management > Approval > Approval Mappings	“Approver mappings” on page 115.

Action	Menu item	See the section
Stage 10—Configure assignment		
Define group assignment and automatic assignment to individuals.		“SRM assignment configuration” on page 127.
Create assignment routing for SRM	Application Administration Console > Standard Configuration tab	“Creating assignment routing for SRM” on page 128
Create group assignments for SRM	Foundation > Configure Assignment > Configure Application Assignment	“Creating group assignment for SRM” on page 130 Note: Even if you have already creating assignment routing for other ITSM applications, you must configure the Service Request Assignee, Work Order Manager, and Work Order Assignee.
Stage11—Configure entitlement		
Create entitlement groups (optional).	Service Request Management > Entitlement > Entitlement Group Management	“Creating entitlement groups (optional)” on page 138.
Create people entitlement rules.	Service Request Management > Entitlement > Entitlement Management	“Adding people entitlement definitions” on page 139.
Add service request definition qualifications for entitlement.	Service Request Management > Entitlement > Entitlement Management	“Adding service request definition qualifications” on page 141.
Validate users (optional).	Service Request Management > Entitlement > Entitlement Management	“Validating users (optional)” on page 142.
Configure on behalf of definition rules for users (optional). Note: On behalf of definition rules can also be used for service requests even if entitlement is not enabled.	Service Request Management > Entitlement > On Behalf Of Management	“Creating On-Behalf-Of definition rules” on page 144.

As the SRM Administrator, you can think of your main job as creating two of the basic building blocks used in SRM—the application template and the AOT.

Figure 3-1: SRM building blocks used to create an SRD



In addition, you are providing all the underlying infrastructure for SRM to work properly, configuring assignment, approvals, entitlement, and so on.

When you have performed the *basic* level of SRM configuration described in this section, the Service Catalog Manager can use the AOT to successfully create a PDT and an SRD. After the Service Catalog Manager then deploys the SRD, it automatically appears in the Request Entry Console.

SRM users can then search for the SRD as one of the services available to them, and then submit and view their requests.

Creating application templates

You can use application templates for routine incidents, standard changes, or work orders that users frequently request.

— **IMPORTANT** —

Do not confuse application templates with application object templates (AOTs)—AOTs are container objects that contain an application template.

Application templates are templates that are part of other applications, for example:

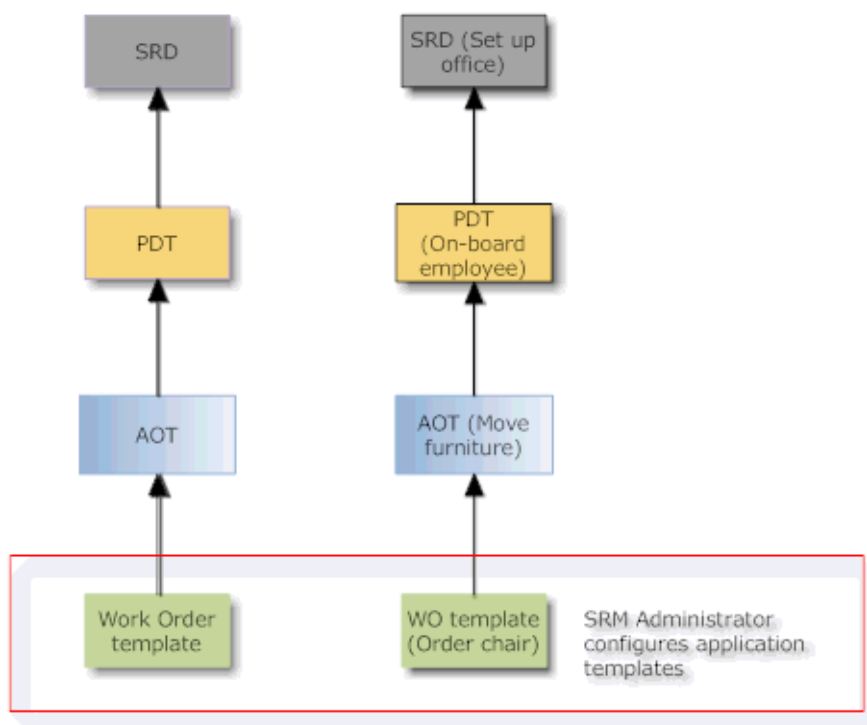
- Work order templates are used with the Work Order Management application, which is bundled with SRM.
- Change templates are used with the ITSM Change Management application.
- Incident templates are used with the ITSM Incident Management application.

NOTE

Application templates are sometimes called “application *fulfillment* templates” because you create them from the underlying applications that fulfill their tasks (for example, Work Orders or Change Management), not SRM.

Your main task now is configuring the first major building block in SRM—the application template. For the SRM Administrator, the *main* use of an application template is including it with an application object template (AOT).

Figure 3-2: SRM Administrator configures an application template



If you use an application template with an AOT, you must create it first *before* defining the AOT. In addition, if you do not associate the application template in the Application Object Template form, it is not accessible for SRM to use.

NOTE

You *can* create an AOT without an application template. Quick launch and no-template AOTs do not use application templates. No template AOTs create the back-end request without a back-end template. For more information, see “Defining application object templates (AOTs)” on page 52.



An application template can map to only one AOT. You can create as many application templates as you want, but the best practice is to create application templates for routine incidents, standard changes, or work orders that users frequently request.

As the SRM Administrator, you can simplify the process of creating work orders by creating work order templates for your support groups. You use work order templates to quickly and efficiently create standard work orders with a minimum of mouse clicks and keyboard entry. Work order templates are useful in any work order that follows well-defined methods for specific and repeated requirements—for example, Installs, Moves, Add Changes (IMAC). New and occasional users to work orders should find work order templates very helpful.

For example, using the Work Order Template form, you can create a special “Office Upgrade” template, which is built into an AOT to create back-end requests with certain pre-set values. When a service to upgrade office furnishings is requested, SRM creates a work order with the company, categorizations, tasks, and assignments already predefined. Configuring work order templates requires that you be a member of the Work Order Config group.

NOTE

For more information about AOTs, see the *BMC Service Request Management 2.2.00 Administrator's Guide*.

Configuring work order templates

When using Work Order Management, you can simplify the process of creating work orders by configuring work order templates for use in AOTs. You also can create work order templates to quickly create work orders.

Here you can create templates for any work order or task for users who regularly perform preapproved work orders that follow well-defined methods for specific and repeated requirements, for example, Installs, Moves, and Add Changes (IMAC). You can create as many templates as you want. But the best practice is creating templates only for standardized processes that your users perform on a frequent basis.



The values you configure in the Work Order Template form are used to add information to the Work Order form.

IMPORTANT

You also use work order templates when creating application templates and defining AOTs. For more information, see “Creating application templates” on page 43 and “Defining application object templates (AOTs)” on page 52.

Only users with Work Order Master permissions can create work order templates for their support group. They can modify or delete work order templates for the authoring group.

► To configure work order templates

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Work Order > Work Order Template, and then click Open.

The Work Order Template form appears in New mode.

Figure 3-3: Work Order Template form

The screenshot shows the 'Work Order Template (New)' form in the BMC Software interface. The form is divided into several sections:

- Top Section:** Contains fields for 'Company*' (My Company), 'Template Name*' (Install office furniture for new employee), 'Status*' (Enabled), 'Summary*' (Install office furniture for new), 'Work Order Type*' (General), and 'Notes'.
- Classification Tab:** This tab is active and contains two main sections:
 - Location Information:** Fields for 'Company*' (My Company), 'Region' (America), 'Site Group', 'Site+', and 'Address'. A 'Clear' button is located below these fields.
 - Operational Categorization:** Fields for 'Tier 1+', 'Tier 2', and 'Tier 3'.
 - Product Categorization:** Fields for 'Tier 1', 'Tier 2', 'Tier 3', 'Product Name+', 'Model/Version', and 'Manufacturer'.
- Bottom Section:** Contains 'Save' and 'Close' buttons.

- 3 In the Company field, select a company for the template.
- 4 In the Template Name field, enter a name for the template.
- 5 In the Status field, select an appropriate status level for this template.
- 6 In the Summary field, enter a brief description of the work order.

This information will be entered into the Summary field on the Work Order form.

- 7 In the Work Order Type field, select the appropriate type for this template—for example, General (the default) or Project.
- 8 (Optional) In the Notes field, enter a complete description of the template.

- 9 After you configure all basic your settings, click Save to add your template to the list of available work order templates.

The new template is unregistered for SRM. To register the template by adding it to an AOT, see “Defining application object templates (AOTs)” on page 52.

Configuring classification settings

The values you specify in a work order template’s Classification tab are used to add information to the corresponding Classification tab in the Work Order form. The Classification tab is used to describe the work order and show which products or services are affected by the work order.

- Operational categorization is based on a three-tier hierarchy defined in the Operational Catalog Setup form. The Operational Categorization Selection settings add information to the operational categorization fields in the Classification tab of the Work Order form.
- Product categorization is based on a five-tier hierarchy defined in your Product Catalog Setup form. The Product Categorization Selection settings add information to the product categorization fields in the Classification tab of the Work Order form.

For more information about company product catalog information and operational catalog information, see the *BMC Remedy IT Service Management 7.0 Configuration Guide*.

► To configure classification settings

- 1 In the Work Order Template form, click the Classification tab.

Figure 3-4: Work Order Template form—Classification tab

Classification		Tasks	Assignment	Type Fields
Location Information				
Company*+	My Company			
Region	America			
Site Group				
Site+				
Address				
Clear				
Operational Categorization				
Tier 1+	Change			
Tier 2	Application			
Tier 3	Password			
Product Categorization				
Tier 1	Software			
Tier 2	Corporate			
Tier 3	Finance			
Product Name+				
Model/Version				
Manufacturer				

- 2 In the Company field for the Location Information, select the name of the company for this work order.
- 3 In the Region field, select the area of the company.

- 4 In the Site Group field, select the city of the company.
- 5 In the Site field, select the location of the company for this work order.
- 6 Select the appropriate operational categorizations for Tier 1, Tier 2, and Tier 3.
Here you configure the three-tier hierarchy defined in your operational catalog.
- 7 Select the appropriate product categorizations for Tier 1, Tier 2, Tier 3, Product Name, and Model/Version.
Here you configure the five-tier hierarchy defined in your product catalog. If you do not see the appropriate product, continue to make selections in product categorization until you see the appropriate product.
- 8 Click Save.

Configuring task settings

Use the Tasks tab to specify which tasks and task groups to include in this template. This functionality is especially useful for work orders because you can include, for example, typical tasks used to set up a new employee.

► **To configure task templates settings**

- 1 In the Work Order Template form, click the Tasks tab.

Figure 3-5: Work Order Template form—Task tab

Type	ID	Name	Instance	Sequence
Task Template	1	Check Approval au	1	1

Name	Instance	Type
------	----------	------

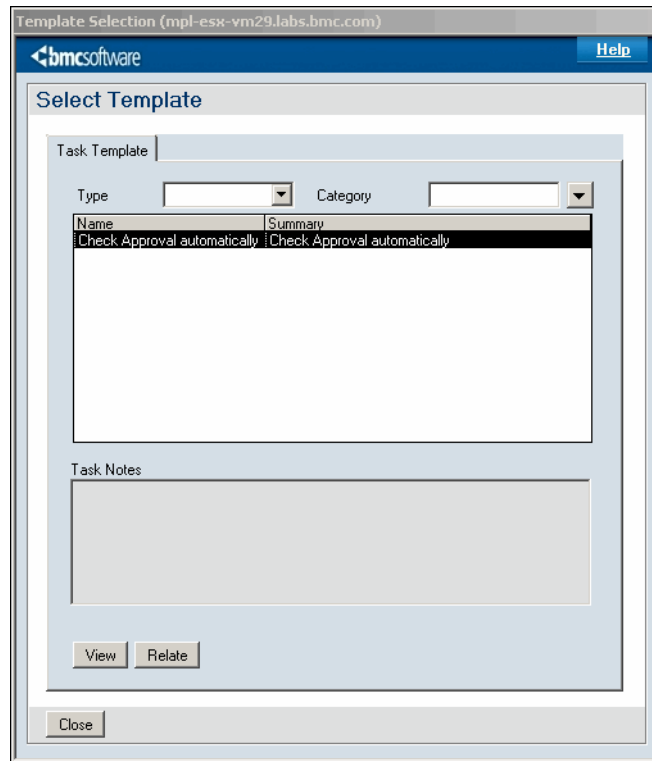
View Remove Type TaskTemplate Relate View

The tab shows tasks and task groups related to the template, along with any child tasks of the selected task group.

- To display tasks already added to the template, select a task and then click View.
- To remove tasks from the template, select a task and then click Remove.
- To display a child tasks, select the child task and then click View.
- 2 To add a task or task group to your template, select a request type in the Type list (for example, Task Template) and then click Relate.

The Select Template dialog box appears.

Figure 3-6: Select Template dialog box



- 3 (Optional) Use the Type and Category fields to filter the list of tasks displayed.
- 4 Select a task or task group, and then click Relate.

The task or task group is added to the template. If needed, you can click View to display the task template.

- 5 Close the dialog box.
- 6 In the Work Order Template from, click Save.

Configuring assignment settings

The values you configure in a work order template's Assignment tab are used to add information to two areas in the Assignment tab of the Work Order form:

- The Request Manager settings fill the Request Manager fields in the Assignment tab of the Work Order form. Here you configure the support company, organization, and group that the work order will be assigned to.
- The Request Assignee settings fill the Request Assignee fields in the Assignment tab of the Work Order form. Here you configure the support company, organization, and group that the work order will be implemented by.

► To configure assignment settings

- 1 In the Work Order Template form, click the Assignment tab.

Figure 3-7: Work Order Template form—Assignment tab

Request Manager		Request Assignee	
Support Company	My Company	Support Company	My Company
Support Organization	IT Support Organization	Support Organization	IT Support Organization
Support Group Name	Internal Support	Support Group Name+	Internal Support
Request Manager	john_change	Request Assignee+	john_change
<input type="button" value="Clear"/>		<input type="button" value="Clear"/>	

- 2 Specify Request Manager settings as follows:
 - a In the Support Company field, select the company that the work order is assigned to.
 - b In the Support Organization field, select an organization.
 - c In the Support Group Name field, select a group.
 - d In the Request Manager field, select a manager.
- 3 Specify Request Assignee settings as follows:
 - a In the Support Company field, select the company that the work order is implemented by.
 - b In the Support Organization field, select an organization.
 - c In the Support Group Name field, select a group.
 - d In the Request Assignee field, select an assignee.
- 4 Click Save.

Configuring type fields

— **IMPORTANT** —

You configure the Type Fields exclusively for use with advanced interface forms. You do not need to configure this information for quick start configuration. For more information, see “Registering advanced interface forms” on page 149 and “Configuring type fields in the Work Order Template form” on page 151.

Creating change and incident templates

If you have Change Management or Incident Management installed on your system, you can create change or incident templates to use with your AOTs.

► To create change templates

NOTE

Only a user with Change Master or Change Config permissions can create change templates for their support group. For additional information about change templates, see the *BMC Remedy IT Service Management 7.0 Configuration Guide*.

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Change Management > Template > Template, and then click Open.

The Change Template form appears in New mode.

- 3 Create a change template that performs a basic task for your users, for example, reset the phone number and voice mailbox for a new employee.
- 4 After you configure all your settings, click Save to add your template to the list of available change templates.

The new template is unregistered. To register the template by adding it to an AOT, see “Defining application object templates (AOTs)” on page 52.

► To create incident request templates

NOTE

Only a user with Incident Master or Incident Config permissions can create incident templates for their support group. For additional information about incident templates, see the *BMC Remedy IT Service Management 7.0 Configuration Guide*.

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Incident Management > Template > Template, and then click Open.

The Incident Template form appears in New mode.

- 3 Create an incident template that performs a basic task for your users, for example, so that new employees who forgot their passwords can create an incident.
- 4 After you configure all your settings, click Save to add your template to the list of available incident templates.

The new template is unregistered. To register the template by adding it to an AOT, see “Defining application object templates (AOTs)” on page 52.

Defining application object templates (AOTs)

You use the Application Object Template (AOT) form to define the company, application, and optional application templates to use with the AOT. Defining an application object template allows it to be used for later development, when you create process templates and service request definitions.

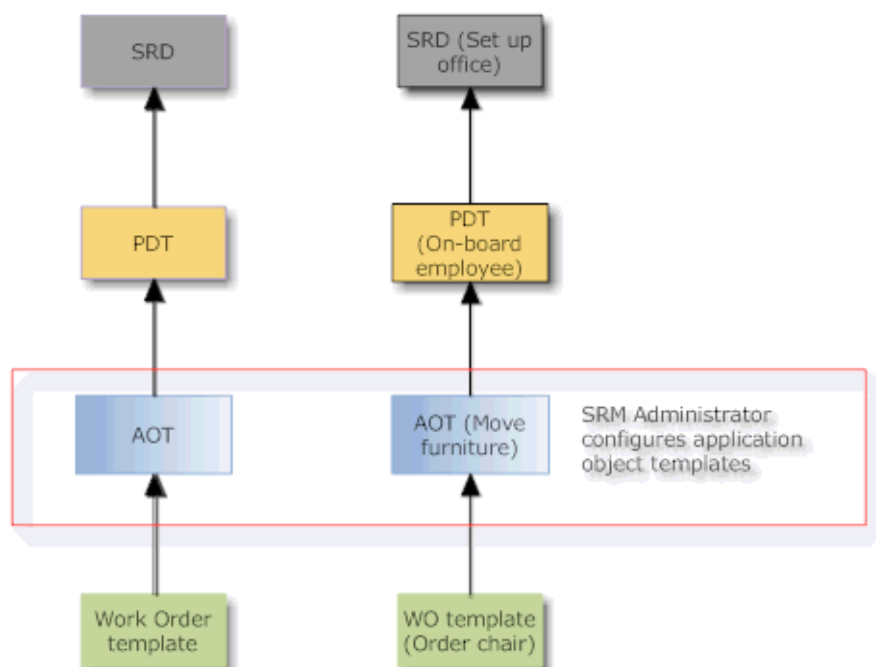
— **IMPORTANT** —

Do not confuse application object templates (AOTs) with application templates—AOTs are container objects that contain an application template.

By default, BMC provides several application object templates (AOT) as part of its sample data.

Your main task now is creating the second major building block in SRM—the application object template (AOT). For quick development or proof of concept, the SRM Administrator uses the Application Object Template form to define a specific company, application, and optional application templates to use with SRM processes. Configuring an AOT allows it to be used for later development, when the Service Catalog Manager creates process definition templates (PDT) and service request definitions (SRD).

Figure 3-8: SRM Administrator configures an AOT



Each AOT can include one application template. By default, BMC provides several application templates as part of its sample data. You can only add an *unregistered* application template to an AOT. For more information, see “Creating application templates” on page 43.

Finally, you can use the Application Object Template form to associate target data to AOTs that are used with Service Request Management. Adding target data to your AOT allows you to add requester questions when you define your SRD. You cannot add questions to your SRD until you have added target data to your AOT.

For information about target data from applications other than Change Management, Incident Management, or Work Orders, see “Defining target data from third-party applications” on page 169.

► To map application templates to application object templates (AOTs)

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Application Configuration > Define Application Object Template, and then click Open.

The Application Object Template form appears in New mode.

Figure 3-9: Application Object Template form

The screenshot shows the 'Application Object Template (New)' window. On the left, there are several input fields: 'Application Object Template ID' (with a search icon), 'Locale' (dropdown set to 'en_US'), 'Company*' (dropdown set to 'Acme Corporation'), 'Type*' (dropdown set to 'TEMPLATE'), 'Name*' (text field 'Install new phone'), 'End User Displayed Name' (text field), 'Summary*' (text field 'Install new phone'), 'App Registry Name*' (dropdown set to 'Work Order Application'), 'Template Name*' (text field), 'Status*' (dropdown set to 'Active'), and 'URL' (text field). On the right, there is a table with columns 'FieldForAnswer', 'DefaultValue', 'Exposed', and 'MappedFieldID'. Below the table is an 'Add Target Data' button. At the bottom of the form are 'Save', 'Other Locales...', and 'Close' buttons.

- 3 Enter the following information:

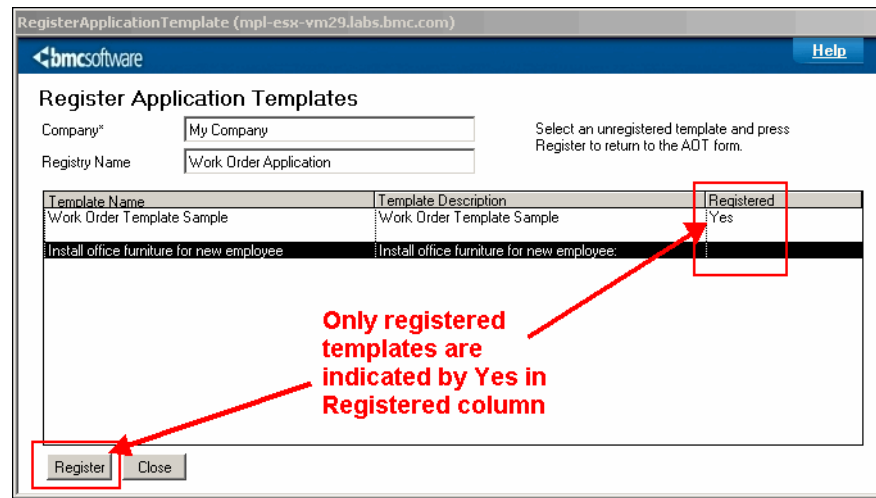
Field Name	Description
Locale	<p>Specify the locale to display the AOT in the language that is the most useful to your users. You can deliver localized AOTs for use with PDTs, simultaneously, in multiple languages with different formatting.</p> <p>Here you are creating the initial set of display properties in the AOT, based on the locale that you specify, for example, en_US. These display properties are saved in a back-end form, for use with other locales you can define later, for example, fr_FR.</p> <p>For more information, see the <i>BMC Service Request Management 2.2.00 Administrator's Guide</i>.</p>

Field Name	Description
Company	Specify the company connected with this AOT. Note: If you create a global AOT, you cannot use the TEMPLATE type.
Type	Specify the type of AOT. You can select from the following types: <ul style="list-style-type: none"> ■ NO TEMPLATE—AOT does <i>not</i> use an application template to create the back-end request. Can include target data. ■ Quick Launch—Launches a URL in another window and completes the service request for tracking purposes. Using a Quick Launch AOT with an SRD does not require approval. Also, quick launch AOTs do not use application templates. ■ TEMPLATE—AOT uses an application template with pre-defined values. Cannot be used with global AOTs. Can include target data. Note: You must select the NO TEMPLATE or TEMPLATE type before you define the target data.
Name	Enter a descriptive name of the AOT.
End User Displayed Name	Enter a “user friendly” name of the AOT. This name appears in the Process View DVF field at runtime.
Summary	Enter a descriptive summary of the AOT.
App Registry Name	Select one of the registered applications. Note: Not all the items displayed in the menu are eligible.
Template Name	Registers an application template with this AOT when the form is in New mode (see step 4 on page 54). The name of the unregistered template is then entered into the field. After registering the template, you have locked the AOT to that template. Note: You can only select application templates that have not yet been registered.
Status	Select the AOT’s status: <ul style="list-style-type: none"> ■ New ■ Active ■ Inactive
URL	The URL field becomes activated when you select the Quick Launch type. Enter the URL needed to launch the window—for example: http://www.google.com URLs are especially useful when creating Quick Launch SRDs.

- 4 From the Template Name field, click Select to register an application template with this AOT when the form is in New mode.

The Register Application Template dialog box opens.

Figure 3-10: Register Application Template dialog box



When you create an application template, you can register it with an AOT. The pre-set values in the application template will be associated with the AOT. When you include the AOT in an SRD, the pre-set values are then used to create the back-end requests when the SRD is instantiated as a service request. (For more information about AOTs, see the *BMC Service Request Management 2.2.00 Administrator's Guide*.)

NOTE

Application templates must be created by the back-end registered application before you can register them with SRM. For more information on change and incident templates, see “Creating application templates” on page 43.

All registered templates that belong to the registered application display **Yes** in the table, along with a name and brief description.

- 5 Select an *unregistered* template from the list, and then click Register.

The Register Application Template dialog box closes and the name of the application template appears in the Template Name field.

The application template becomes registered with the AOT when you save your changes.

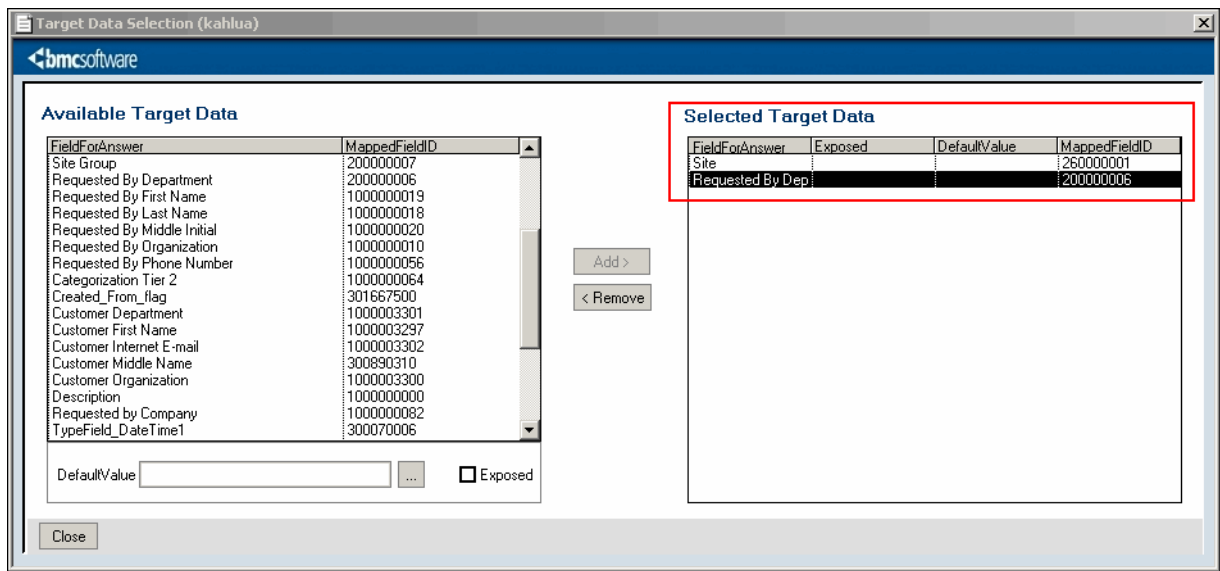
NOTE

Application templates can be registered only once, and you can include only one application template per AOT.

- 6 Click the Add Target Data button.

The Target Data Selection dialog box appears.

Figure 3-11: Target Data Selection dialog box



- 7 From the Available Target Data table, add target data fields to the AOT.

Make sure that sufficient target data is added. An attempt to create a work order from the SRD will fail if all the required fields are not included, for example, the Summary field is not added as a target.

- 8 In the list of selected target data, define a default value for the target data in the Default Value field.

For example, administrators can configure that the Customer Name field with a prepopulated value (\$USERS) appears on the SRD. Administrators can also add hidden fields to the SRD, with certain prepopulated values.

Even if the target data is *not* exposed, you should provide default values, so that the correct target data will be provided. An attempt to create a work order from the SRD will fail if all the required fields do not have the right values entered, for example, the Summary field is left empty.

- 9 Specify if the target data selected is exposed to the SRD.

The target data must be exposed *if* you want to associate that target data to a requester question when defining the SRD.

Be careful about the target data that you expose to end users. An attempt to create a work order from the SRD will fail if the end user enters the wrong values, for example, if the Priority field in a work order has some value other than Critical, High, Medium, or Low.

- 10 Click Save.

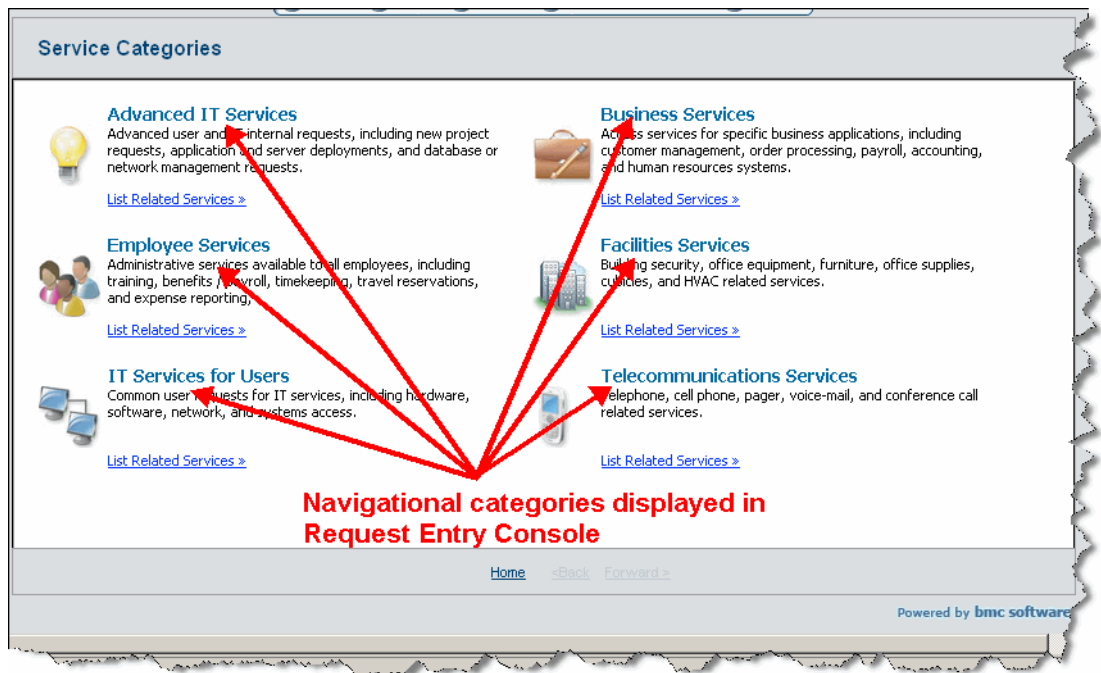
When the Service Catalog Manager associates the AOTs to the PDT, this action rolls up the target associated with the AOT to the PDT.

- 11 Save the AOT and close the form.

Configuring navigational categories

You must set up navigational categories before the Service Catalog Manager can choose these categories for creating SRDs. These navigational categories are also displayed in the Request Entry Console.

Figure 3-12: Navigational Categories displayed in the Request Entry Console



When creating your navigational categories, use the following best practice. Divide the service into two parts and make two lists:

- Items you support—for example, Hardware, Software, Networks, and so on.
- Actual services you provide—for example, Repaired, Replaced, Trained, and so on.

Create a spreadsheet with the items you support down the left hand side and the services you provide across the top row. Each spreadsheet cell represents a category and service pair, for example, Hardware/Repaired. Determine which pairs apply to your organization, and then you can map your old tree to this new structure.

► To configure navigation tasks, the following tasks need to be done in the order specified

- Step 1** Define the navigation categories. See “Defining navigational categories” on page 58.
- Step 2** Configure them to appear in the console. See “Defining Browse for Service details” on page 61

Defining navigational categories

You define all the categories in the Navigational Category form. This form is used as a repository to store the categorizations that differentiate the catalog offerings. You can create generic categories that globally apply to all organizations, for example, Hardware/Computers/Dell.

After you define the navigational categories, they appear in two places:

- The Service Catalog Manager uses them when creating an SRD.
- *After* you define the Browse for Service details, the Category 1 value is then displayed in the Request Entry Console (in the Service Categories). Category 2 and Category 3 values are displayed under Browse Sub-Categories.

You can define categories for one company, which makes the appropriate categories visible *only* for that company. Using the Navigational Category form, you can create three levels of categorizations for a specific company, for example, Installation > Desktop > Windows, or Change > Application > Password.

The company and categories enforce the uniqueness of the categorization, which means that only one unique combination of categories is allowed per company and per locale.

TIP

You should create only a manageable number of SRDs and navigational categories. Needlessly proliferating the number of navigational categories to users *can* slow the performance of search operations in the Request Entry console.

► To define navigational categories

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Navigational Categories > Navigational Categories, and then click Open.

The Navigational Category form appears in New mode.

Figure 3-13: Navigational Category

TIP

You can place the form in Search mode (for example, by pressing the F3 key) and then click Search to view preconfigured categorizations. If unqualified searches are disabled on your system, you must select specific criteria (for example, a company or a category) to search for existing navigational categories. You may use the preconfigured categorizations or modify them.

- 3 Enter the following *required* information:

Field name	Description
Locale	Specify the locale to display the navigational category in the language that is the most useful to your users. You can deliver localized navigational categories to different users, simultaneously, in multiple languages with different display properties. For more information, see <i>BMC Service Request Management 2.2.00 Administrator's Guide</i> .

Field name	Description
Category 1	Enter the first tier or level of categorization, for example, Hardware. This value populates the Navigational Categories section in the Service Request Definition form. Note: This Category 1 value is <i>also</i> used as one of the Service Categories in the Request Entry Console. But the value does not appear <i>until</i> you define the Browse for Service details. (See “Defining Browse for Service details” on page 61.)
Status	Select Enabled if you want this categorization entry to be available to users. You can also select the following options: <ul style="list-style-type: none"> ■ Proposed ■ Offline ■ Obsolete ■ Archive ■ Delete

4 Enter the following *optional* information:

Field name	Description
Category 2	Enter the second level of categorization, for example, Printer. Note: In the Request Entry Console, the Category 2 value is displayed under Browse Sub-Categories.
Category 3	Enter the third level of categorization, for example, Xerox Laser Printer. Note: In the Request Entry Console, the Category 3 value is displayed under Browse Sub-Categories.

5 To relate the categories to a specific company, do the following:

- a From the Company field, select a company from the list.

If you select Global, the settings apply to all companies.

NOTE

If you do not select a company, by default the category is global.

- b Click Relate.

The company is added to the Company Relationships table. You can associate multiple companies with the categories.

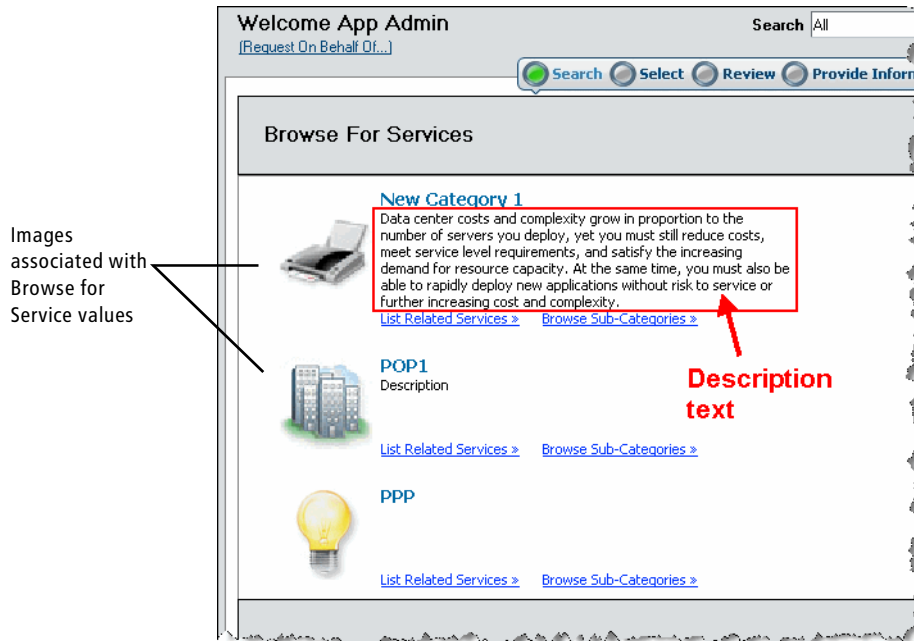
- c To delete a company from the Company Relationships table, select an entry and then click Remove.

6 After you have finished, save your changes and close the form.

Defining Browse for Service details

After you create the navigational categories, the Browse for Service Details form allows you to add and modify the description and associated image to the Browse for Service values that are displayed in the Request Entry console.

Figure 3-14: Images associated with Browse for Service values



SRD categories are pre-configured by default with their own images. You can relate a different image with these categories. In addition, when you configure your own navigational categories for your organization, you can assign customized images to them as well, based on your organization. (For more information, see “Configuring service request image definitions” on page 64.)

► To define Browse for Service details

- 1 From the Application Administration Console, click the Custom Configuration tab.

- 2 From the Application Settings list, choose Service Request Management > Request Entry Management > Browse for Service Details, and then click Open.

The Browse for Service Details form appears.

Figure 3-15: Browse for Service Details form

- 3 Select a company from the menu.
If you select Global, the browse details apply to all companies.
- 4 Select a navigational category from the menu.
If an image is already attached to the category, the category’s image appears below the Service Request Definition title list.
- 5 Enter a brief description of the Category 1 value.
- 6 Specify the visibility of the category.

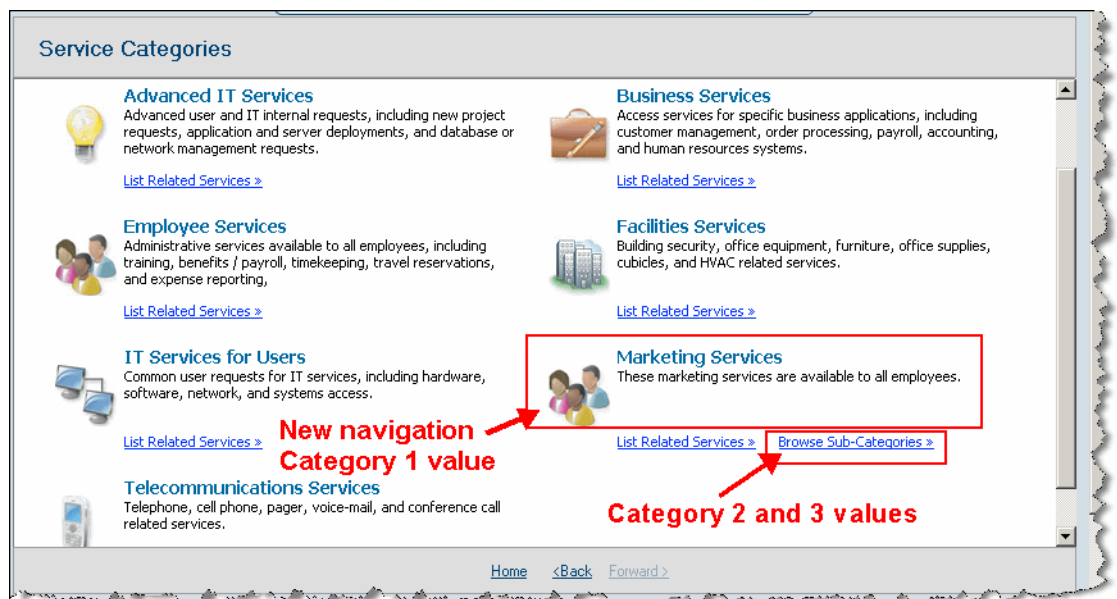
Browse Visibility	Description
Visible	Automatically displayed in Service Categories in Request Entry Console <i>before</i> any SRDs have been deployed using this category. This is the system default setting.
Hidden	Does not appear in the Request Entry Console.
Dynamic	Displayed in Service Categories in Request Entry Console <i>after</i> you have created and deployed the SRD, <i>and</i> the SRD is online.

TIP
If the navigational categories are not displayed as expected, make sure the browse visibility is set to Visible or Dynamic.

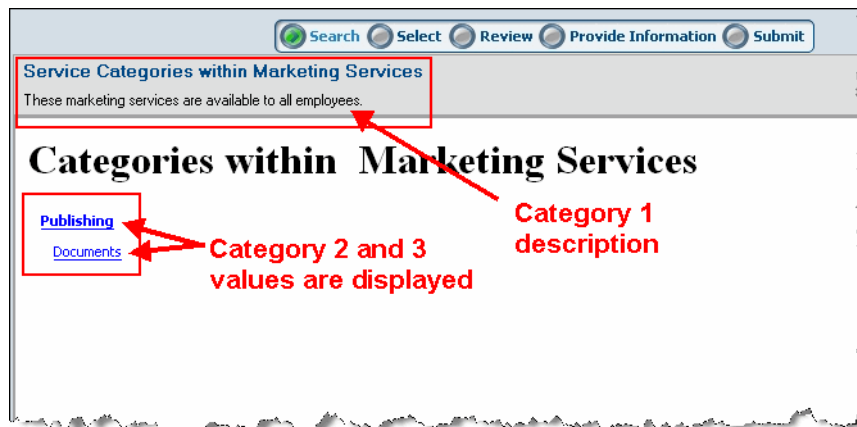
- 7 Click Show All Images.
- 8 Scroll through the list of images until you find the image that you want to associate with the category.
- 9 Select the image.
- 10 Click Modify.
- 11 Close the form when you are finished associating images with categories.
- 12 Open the Request Entry Console.

If you correctly configured the navigational categories and the browse details, the category now appears by default.

Figure 3-16: New navigational category displayed in Request Entry Console



- 13 Click Browse Sub-Categories.
- The Category 2 and 3 values are displayed.

Figure 3-17: Category 2 and 3 values displayed in Request Entry Console**IMPORTANT**

When you open the Request Entry Console, the default SRDs shipped with SRM are not yet available to users. You must first deploy them.

Configuring service request image definitions



The Service Request Images form lets you view, modify, replace, or add (for proof of concept) the various images used in the SRM consoles and forms. For example, you can replace the default `advanced_48.jpg` file that is used in the Request Entry console with a different image that better suits your organization or your locale.

NOTE

You can include any standard graphic format used with HTML code, for example, `.gif`, `.png`, or `.jpg` graphics. You can even use animated GIF images. Generally, the smaller the image, the better the performance.

► To configure service request image definitions

- 1 From the Application Administration Console, click the Custom Configuration tab.

- 2 From the Application Settings list, choose Service Request Management > Request Entry Management > Service Request Image Configuration, and then click Open. The Service Request Images form appears.

Figure 3-18: Service Request Images form

BMC SERVICE REQUEST MANAGEMENT
Service Request Image

Service Request Images

Company* - Global -

Image Selection

Image Name* Default Image

Image File Name* advanced_48.jpg

File Name	Max Size	Attach
advance...	23 KB	z2AF...

Show Image

Save Close

- 3 To replace an image with a different one, perform the following actions:
 - a Open the Service Request Images form in Search mode.
 - b Search for a record.
 - c Right-click the image inside the attachment field, and then select Delete.
 - d Right-click inside the attachment field, and then select Add.
 - e Add the image.
 - f Save your changes.
- 4 To create your own image, perform the following actions:
 - a Specify a company.
 - b Right-click inside the attachment field, and then select Add.
 - c Add the image.
 - d Enter the image name and the image file name.
 - e Save your changes.

You now can use this image in the Request Entry console as needed, for example, when you create a new navigational category.

- 5 When you are finished, close the Service Request Images form.

For additional configuration you can perform, see “Managing SRD images” on page 73.

Configuring service request definitions

This section provides basic configuration steps for service request definitions (SRDs).

Defining service request definition settings

Use the Service Request Definition Settings form to specify the default behavior of service request definitions.

IMPORTANT

You must have SRM Administrator permissions to access this form.

- To define service request definition settings
- 1 From the Application Administration Console, click the Custom Configuration tab.

2 From the Application Settings list, choose Service Request Management > Advanced > Service Request Definition Settings, and then click Open.
- The Service Request Definition Settings form appears.

Figure 3-19: Service Request Definition Settings form

BMC SERVICE REQUEST MANAGEMENT

Request Management

Help

bmcsoftware

Service Request Definition Settings

Select Yes to use the approval server to determine the approvers of the Service Request Definition.

Company*

Select No to bypass the approval server. In this case approvers will be based on the selections on the Service Request Definition form.

Use Approval Server?*

Yes

Hot List Interval determines how long metrics are kept to determine the top used Service Request Definition over the given period of time.

Hot List Interval*

Week

Top Hot List Request determines the top number of Service Request Definition that will show up on the Service Request Console.

Top Hot List Request*

10

Setting the Business Process Sandbox Dataset enables Business Process being created upon a Business Service getting linked to Service Request Definition when the Service Request Definition status is Deployed. You will also need to set the Reconciliation Job Name, so that the appropriate Reconciliation Job runs to reconcile and merge the Business Process created in the sandbox dataset.

Business Process Sandbox Dataset

Reconciliation Job Name

Submitter*

appadmin

...

Submit Date

...

Last Modified By

...

Last Modified Date

...

Save

Close

- 3 Select the company to which these settings apply.
- For the global SRD settings, the company is specified as Global.

- 4 Select Yes (the default) to use the approval server to determine the approvers of the SRD.

If you select No, the approval server is bypassed. In this case, approvers will be based on the selections on the Service Request Definition form.

- 5 In the Hot List Interval field, specify how long metrics are kept to determine the top-used SRD over the given period of time.

Your options are Day, Week (the default), or Month.

- 6 In the Top Hot List Request field, specify the top number of SRDs that will be displayed on the Request Entry console.

The default is 10.

- 7 From the Business Process Sandbox Dataset list, specify the sandbox dataset.

IMPORTANT

If multiple sources of data provide updates to the BMC Atrium CMDB, you must specify a sandbox dataset.

When a business service is related to the SRD and the SRD is then deployed, the business process is created.

- 8 Specify the Reconciliation Job Name.

This job runs the appropriate reconciliation job with the selected sandbox dataset. You must use reconciliation rules to move the data to production.

IMPORTANT

If you change the production or sandbox datasets on this form, in the Reconciliation Engine you must update the underlying reconciliation rules “BMC Asset Management – Sandbox” to use the new datasets. Without this change, the data will not be able to be reconciled to the new production or sandbox datasets.

- 9 Click Save.

Defining questions to use with SRDs

You need to configure the Questions Library to include the questions for your end users. When an application instance occurs, the responses are pushed to the corresponding fields of the Application Instance form. The user’s responses are pushed to the application instance for a particular application object template.

When defining questions to use with SRDs, the SRM Administrator has three major tasks:

- Create target data that corresponds to fields on the back-office request form. The target data, after you associate it to an application object template (AOT), is then rolled up into the process definition template (PDT).
- Create a list of questions in the Questions Library form. Each question in the list consists of a representation definition, for example, a formatted question and answer.
- Add target data to the AOT.

IMPORTANT

Target data for Work Orders is provided by default with the installation of SRM. For the Change Management and Incident Management applications, the data is provided with the integration installer.

Any target data and questions you create will be used later, when the Service Catalog Manager creates a service request definition (SRD). When an SRD is defined and a PDT is selected, the Service Catalog Manager can map questions stored on the Questions Library form to the target data. This list of questions selected in the SRD is used by the Request Entry console to render the questions that end users can answer.

When a service request is instantiated and is in the Planning state, the Application Object Instance (AOI) uses the responses to the questions, along with predefined values, and pushes this data to the back-office request entry.

NOTE

The AOT does not necessarily have to map to an application template, if the back-end application is not using templates. For back-end applications that do not support templates, there is a default application object template entry for Work Orders. When the back-end request is created, required data is pushed to the back-end requests using the question template with the prepopulate mode of “System” or “Predefined” and other command parameters.

IMPORTANT

When SRM data (from user input to questions or target data from configuration) is passed to the back-end applications, not all applications process this data in the same way. In Incident Management and Change Management, SRM data takes precedence over the template data. However, for Work Orders, the values from work order templates takes precedence over SRM data.

Defining the Questions Library entries

In the Questions Library form, you can define a set of questions that the user is prompted to answer when creating a service request from the SRD. The user's answers to these questions enable the business service manager and task implementers to get more information about the service request.

Figure 3-20: Questions Library form

The screenshot shows a web form titled "Questions Library (New)" with the BMC Software logo. The form contains the following fields and controls:

- Locale:** A text field containing "en_US" with a dropdown arrow on the right.
- Question Text*:** A large text area for entering the question text. Below it is a note: "Note: Limit question text to no more than 70 total characters." and a small "..." button.
- Category*:** A dropdown menu.
- Status*:** A dropdown menu with "Active" selected.
- Answer Format:** A section header.
- Answer Format*:** A dropdown menu.
- Default Value:** A text field with a small "..." button on the right.

At the bottom of the form are "Save" and "Close" buttons.

You map the questions you create to AOTs and PDTs. When an application instance occurs, the responses are pushed to the corresponding fields of the application instance form. The user's responses are pushed to the application instance for a particular application object template.

► To define the questions library entries

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Application Configuration > Define Questions Library, and then click Open. The Questions Library form appears in New mode.
- 3 Enter the following information:

Field Name	Description
Locale	<p>Specify the locale to deliver questions in the language that is the most useful to your users.</p> <p>You can deliver localized questions to different users, simultaneously, in multiple languages.</p> <p>Note: Only questions with a locale that matches <i>exactly</i> the locale on the SRD are displayed in the questions dialog.</p>

Field Name	Description
Question Text	<p>Enter a question for the end user.</p> <p>Note: Although the field allows you to enter 254 characters, limit your question text no more than 70 total characters, including spaces. Only 70 characters are displayed in the Request Entry console.</p>
Category	Select the application to which the answer will be pushed. This is the value you specified for the Registry Name field on the Application Registry form.
Status	Select Active if you want this question to be visible.
Answer Format	<p>Specify the format of the answer to this question entry. The Answer Format that you specify controls the visual format of the field that will be displayed to the end user to collect the additional information. Depending on your selection, additional fields are added to the form.</p> <p>The choices are as follows:</p> <ul style="list-style-type: none"> ■ Date and Time Type—Inserts a calendar field next to the response field for user selection. The response is in a date and time format. ■ Multi Answer Horizontal—Inserts values with radio buttons for the user's response. The user can select several values. If you select this option, some fields appear on the Questions Library form. You can specify the number of choices that you want to appear next to the question (maximum three) and the values for those choices (no more than ten characters). ■ Multi Line input—Inserts a text box for the user's response. This is just a character field that shows the end user three lines of their input. ■ Single Answer Horizontal—Inserts values with radio buttons for the user's response. The user can select only one value. If you select this option, fields appear on the form. You can specify the menu list values, the sort order, and the locale in which this will appear. ■ Single Answer Menu—Inserts a menu with values that the user can select from or they can type their own value. If you select this option, fields appear on the form. You can specify the menu list values, the sort order, and the locale in which this will appear. ■ Single Line Input—Inserts a text box where users can enter up to 128 characters. ■ Two Items—Inserts radio buttons for a Yes or No response from the user. The options are limited to Yes and No. These options cannot be changed.

Field Name	Description
Default Value	<p>Specify the default value (if any) to this question entry. The Default Value that you specify is dictated by the Answer Format. Depending on your selection, additional fields are added to the form.</p> <p>The choices are as follows:</p> <ul style="list-style-type: none"> ■ Date and Time Type—A standard character field appears. You can enter a date and time default value in character text in which this answer will appear, for example, 12:00 P.M. ■ Multi Answer Horizontal—Multiple fields appear on the Questions Library form, including the standard character field. You can specify the number of choices that you want to appear next to the question (maximum three) and the values for those choices (no more than ten characters) in which this will appear. ■ Multi Line input—A standard character field appears. You can enter default values in character text that illustrate to the end user some sample input, for example, Enter answer here. ■ Single Answer Horizontal—Multiple fields appear on the Questions Library form, including the standard character field. You can specify the default value, a prefix, and a suffix in which this answer will appear. ■ Single Answer Menu—Multiple fields appear on the Questions Library form, including the standard character field. You can specify the menu label, the item label and list values, and the sort order in which this answer will appear. ■ Single Line Input—A standard character field appears. You can enter default values in character text that illustrate to the end user some sample input, for example, Enter answer here. Users can enter up to 128 characters. ■ Two Items—Standard character field appears. The default values are limited to Yes and No.

4 Click Save.

Defining SRD levels

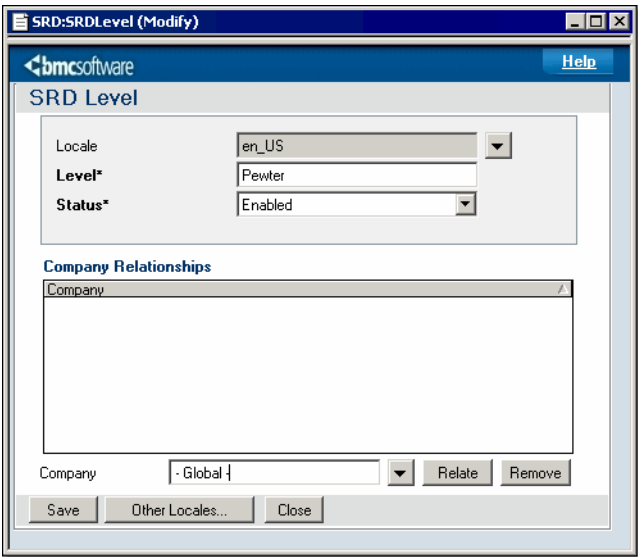
The SRM Administrator can create entries for “levels” of service, for example, Gold, Silver, or Bronze. You can also modify these service levels for different locales.

► To define SRD levels

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > SRD Level > SRD Level, and then click Open.

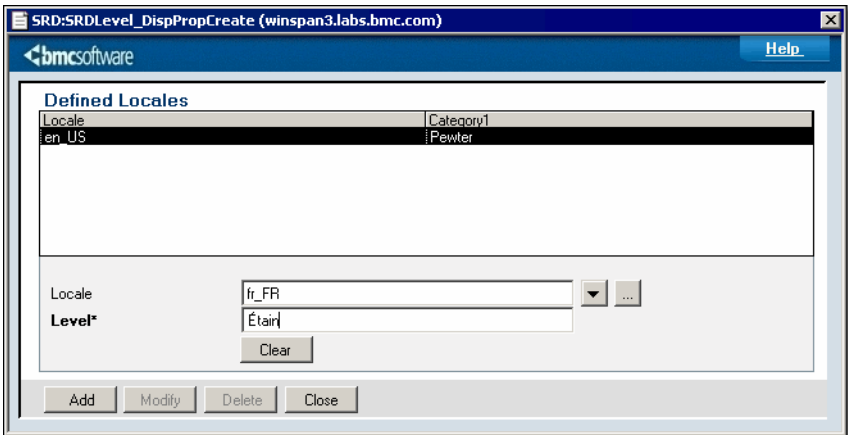
The SRD Level dialog box appears.

Figure 3-21: SRD Level dialog box



- 3 Select a new locale, for example, en_US.
- 4 Enter a new level, for example, Pewter.
- 5 Select the status, for example, Enabled.
- 6 Select the company to which this level applies, or select Global to make this level available to all companies.
- 7 Save the new level.
- 8 To create display properties for this level in different locales, click Other Locales. The Defined Locales dialog box appears.

Figure 3-22: Defined Locales dialog box



- 9 Select a locale, for example, fr_FR.
- 10 Enter the localized level, for example, Étain.

- 11 Click Add, and then close the dialog box.

If you search for these new levels in the SRD Level dialog box, both items are available, each in their respective locale, US English and French. For more information, see the localization chapter in the *BMC Service Request Management 2.2.00 Administrator's Guide*.

When the Service Catalog Manager creates the SRD, the new level is available for use.

Managing SRD images

After the Service Catalog Manager has created SRDs *and* after you have added images to your company or organization, you use the Service Request Management Image Management form to relate these images to your SRDs. For example, if you added a new default image, you can map your SRDs to display this image in the Request Entry console.

You can also map multiple SRDs to one image.

You can relate different images for different locales per SRD. For example, you can relate one image appropriate for the en_US locale, and a different image appropriate for the fr_FR locale.

► To manage SRD images

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Request Entry Management > Service Request Definition Image Management, then click Open.

Figure 3-23: Service Request Definition Image Management form

The screenshot shows the 'Service Request Definition Image Management' form. It contains two tables and a 'Relate' button.

Title	Status	Category1
wOCust	Deployed	Projectores
wOReq	Deployed	Projectores
QL	Deployed	Projectores

Below the first table is a 'No Image' label and a red arrow pointing to it with the text 'Select the SRD title...'.

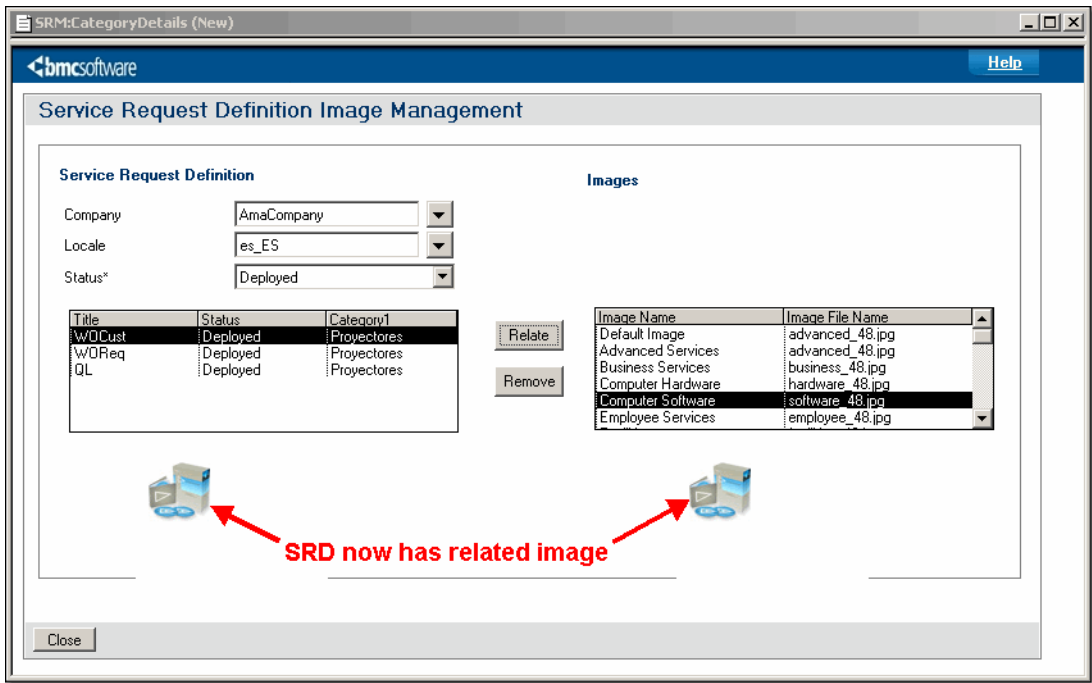
Image Name	Image File Name
Default Image	advanced_48.jpg
Advanced Services	advanced_48.jpg
Business Services	business_48.jpg
Computer Hardware	hardware_48.jpg
Computer Software	software_48.jpg
Employee Services	employee_48.jpg

Below the second table is a red arrow pointing to it with the text '...and then select the image.'.

The Service Request Management Image Management form appears. Now you must select a SRD by using the various search criteria, for example, narrowing down your choices by company, locale, or status.

- 3 Specify a company.
All the SRDs created for this company are displayed.
- 4 Specify the locale, for example, es_ES.
All the SRDs created with the es_ES locale are displayed.
- 5 Specify the SRD status, for example, Deployed.
- 6 Select the SRD title that does not have an image associated (or if you want to relate a different image).
- 7 Select an image from the list.
When you select an image, it is displayed below the Images list.
- 8 Click Relate to associate the title with the image, or click Remove to delete the association.

Figure 3-24: Relating images to SRDs



The SRD now has a related image.

- 9 Save your changes.
- 10 Close the form when you are finished.

When end users log in to the server with specified locale, the SRD image is displayed in that locale.

Configuring survey questions

Use the Search Survey form to set up survey questions for your requesters. Surveys give the Business Service Manager an indication of customer satisfaction levels and how the service desk is performing.

You can configure SRM to automatically send a survey for a specific company or select Global to make the survey available to all companies when a service request is resolved.

— **IMPORTANT**

You must have SRM Administrator permissions to access this form from the Custom Configuration tab. However, the Service Catalog Manager can create questions “on the fly” in the Search Survey form when working with an SRD (in the Service Request tab).

► To configure survey questions

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Advanced > Survey Configuration, then click Open.

The Search Survey form appears.

Figure 3-25: Search Survey form

Surveys	
Survey Name	Company
Global	Global
Customer Satisfaction Survey	Global

Survey Questions		
Locale	Sequence	Question

- 3 Select the company to which this survey applies, or select Global to make this survey available to all companies.
- 4 To create a survey, click Create.

The Configure Survey dialog box appears.

Figure 3-26: Configure Survey dialog box

Locale	Sequence	Question
Click to Refresh		

- 5 Enter a name for your survey.
- 6 Click Save.
The dialog box closes and you are returned to the Search Survey form.
- 7 Click Manage Questions.
The Manage Questions dialog box appears.

Figure 3-27: Manage Questions dialog box

Locale	Sequence	Question
en_US	1	Was this request handled to your satisfaction?

- 8 To create or modify questions in your survey, perform the following steps:
 - a Specify a locale, if your questions must be localized, for example, en_US.
 - b Specify the numerical sequence, for example, 1.
 - c Define the question.
 - d Click Add or Modify.
- 9 Close the Manage Questions dialog box when you are finished.

- 10 Close the Search Survey form.

Miscellaneous configuration

The following sections describe miscellaneous configuration steps for service requests, Request Entry Console behavior, and so on.

Defining behavior rules for surveys

Use the Request Rules form to set up behavior rules for auto-close of service requests and surveys on a per-company basis.

NOTE

You must have SRM Administrator permissions to access this form.

► To configure survey rules

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Advanced > Rules, then click Open.

The Request Rules form appears.

Figure 3-28: Request Rules form

The screenshot shows the 'Request Rules' form in the BMC Service Request Management application. The form has a blue header bar with 'BMC SERVICE REQUEST MANAGEMENT' and 'Request Rules' text, and a 'Help' button. The BMC Software logo is in the top right. The form contains several fields: 'Company*' (a dropdown menu), 'Status*' (a dropdown menu with 'Enabled' selected), 'Enable Survey' (a dropdown menu with 'Yes' selected), and 'Last Surveyed Days' (a numeric input field with '1' entered). To the right of these fields is a 'Description' label and a large text area. At the bottom of the form are 'Save' and 'Close' buttons.

- 3 To modify an existing survey rule, search for it.

The SRM installation includes global request rules, which apply to all companies. For the global request rules, the company is specified as Global.

- 4 Select the company to which this rule applies.

5 Select the status.

Select Enabled (the default) if you want this categorization entry to be available to users. You can also select the following options:

- Proposed
- Offline
- Obsolete
- Archive
- Delete

6 Define survey rules:

- Enable Survey—Select Yes if you want requesters to receive surveys after their requests have been resolved.
- Last Surveyed Days—Select the number of surveys that are sent to a user per day.

Entering 0 means the survey will be sent *every* time a service request reaches the Completed status. Entering 1 (the default setting) means the survey will be sent one time every 24-hour period when a service request reaches the Completed status. Entering 2 means the survey will be sent two times every 24-hour period when a service request reaches the Completed status.

TIP

Do not annoy your users by sending out too many surveys.

7 Optionally, enter a description.

8 Click Save.

Configuring Service Request HTML definitions

The Service Request HTML form lets you view and modify the underlying HTML definition code used in the SRM consoles and forms. For example, you can modify the text, the spacing of table cells, background colors, and so on, of the Summary window that is displayed in the Request Entry console.

You should be familiar with HTML before editing these files.

► To configure service request HTML definitions

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Advanced > Service Request HTML Configuration, then click Open.

The Service Request HTML form appears.

Figure 3-29: Service Request HTML form

Service Request HTML (Modify)

BMC SERVICE REQUEST MANAGEMENT
Service Request HTML

Service Request HTML

Text Tag* ConsoleSummary ...

Locale ...

Status* Active

Text Value

File Name Max Size Attach Label

Attachment1

Preview HTML

KEY_VALUE_JAVA_SCRIPT_INSERT

Summary

Print

Requester: KEY_VALUE_REQUESTER_NAME

Catalog Title: KEY_VALUE_CATALOGTITLE

Request Name: KEY_VALUE_SUMMARY

Date Committed: KEY_VALUE_COMMITTED_COMPLETION

Requested Completion: KEY_VALUE_REQUESTED_COMPLETION

Save Close

- 3 To modify an HTML definition, perform the following actions:
- a Open the Service Request HTML form in Search mode.
 - b Search for an HTML definition record.

Text tag name	Definition
ConsoleSummary	Displays Summary in the Request Entry console.
RCOSRDetails	Displays Service Request Summary in the Service Request Coordinator Console.
RQCBCDetails	Displays Broadcast Details.
RequestViewDetails	Displays Request Summary in the Request Entry console.
SCMPDTSRDDetails	Displays PDT details in the Service Catalog Manager Console.
SCMSRDDetails	Displays SRD details in the Service Catalog Manager Console.
SCMSRDPDTDDetails	Displays SRD Process Info in the Service Catalog Manager Console.
SRDDetails	Displays SRD Description in the Request Entry console.

Text tag name	Definition
SRSBusMgrRequestSummary	Displays Service Request Summary in the Service Catalog Manager Console.
SRSQuestionDetails	Displays Questions in the Request Details dialog box that appears after clicking the Request Details button from a console.
SRSRequestDetails	Displays Request Details in the Request Details dialog box that appears after clicking the Request Details button from a console.
SRSRequestDetailsQuestions	Displays Request Details and Questions in the Request Details dialog box that appears after clicking the Request Details button from a console.

- c Modify the information as needed, for example, tweak the background color or the summary text.
 - d Add locale information to the HTML.
For example, you can use the fr_FR locale to localize this content for your French audience. This content is then displayed in French when end users log in to the server with the fr_FR locale.
 - e Click Preview HTML to see how your changes affected the HTML code.
 - f Save your changes.
- 4 When you are finished, close the Service Request HTML form.

Defining default Request Entry console preferences

The Console Default Preference form allows you to update the default preference record for the Request Entry console. You can configure the appearance and use of the Request Entry console for your end users.

► To define the default Request Entry console preferences

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Request Entry Management > Default Console Preference, then click Open.

The Console Default Preference form appears.

Figure 3-30: Console Default Preference form

BMC SERVICE REQUEST MANAGEMENT
Default Preferences

Details Preferences

Preferences For: System_Preference_Record
System_Preference_Record

General Console Information

Initial Console View: Service Categories

My Requests

Show: All Open Requests

Recently Closed = Closed in the last 7 Day

Broadcast Defaults

Broadcast Auto Popup: Never

Modify Close

- 3 From the Initial Console View field in the General Console Information area, select if the Service Categories, Quick Picks, or Submitted Requests view appears when the Request Entry console is displayed.

The default setting is Service Categories. When you click the Home button in the Request Entry console, you return to the view that you specify here. If there is no setting, the Home link returns you to the Service Categories view.

- 4 Modify the *default* search criteria for My Requests when the Request Entry console is displayed:

- a From the Show field, select if service requests with a particular status should appear.

For example, you might want to display only service requests with a draft status. The default setting is All Open Requests.

- b From the Recently Closed field, select the number and unit criteria for requests closed since the user last logged in.

For example, you might want to display requests that were closed in the last five days. If the application is accessed infrequently, you can enter a higher number, for example, requests closed in the last two weeks or even months.

- 5 From the Broadcast Defaults area, specify when users are alerted with a broadcast alert popup window.

The default is Never. However, users might want to be prompted when they open the Request Entry console or when a new broadcast occurs.

- 6 Click Modify and then click Close.

You must close and re-open the Request Entry console for the changes to be displayed.

Configuring service request query exclusions

You can configure the Request Entry console to ignore frequently used words (such as *and*, *the*, *where*, and so on) or words that you want excluded from the search.

SRM installs by default a list of U.S. English words (with the en_US locale) to exclude. You can also create a localized exclusion list.

NOTE

Query exclusions are applied based on an *exact* match of Locale.

► To configure service request query exclusions

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Request Entry Management > Service Request Search Exclusion String, then click Open.

The Service Request Query Exclusions form appears.

Figure 3-31: Service Request Query Exclusions form

The screenshot shows a web-based form titled "Service Request Query Exclusions (Modify)". The form is part of the "BMC SERVICE REQUEST MANAGEMENT" interface. It features a blue header bar with the text "Service Request Query Exclusions". Below the header, there is a section titled "Service Request Query Exclusions" which contains two dropdown menus: "Status*" set to "Active" and "Locale" set to "en_US". Below these is a text area labeled "Exclusion List" containing the text ";a,the,of,i,as;it,but,and;". A small note next to the text area says "(a semi-colon separated list, must begin and end with semi-colon)". At the bottom of the form are two buttons: "Save" and "Close".

- 3 To modify the list of terms to exclude, perform the following actions:
 - a Open the Service Request Query Exclusions form in Search mode.
 - b Search for a record.
 - c Modify the record as needed by adding additional words to exclude, for example, *because*.
 - d Make sure the list begins and ends with a semicolon.
 - e Save your changes.

- 4 To create a localized exclusion list, perform the following actions:
 - a Specify the status.
 - b Specify the locale, for example, fr_FR.
 - c Create the record by adding words to exclude, for example, *mais*, *parce que*, or *Périgrin*.
 - d Make sure the list begins and ends with a semicolon.
 - e Save your changes.
- 5 When you are finished, close the Service Request Query Exclusions form.

Modifying work order templates

Only users with Work Order Master permissions in a company's support group can modify work order templates for the authoring group.

► To modify work order templates

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Work Order > Work Order Template, and then click Open.
The Work Order Template form appears.
- 3 Switch the form to Search mode.
- 4 Enter the search parameters to find the template to modify, and then click Search.
A list of templates appears.
- 5 Select a template to modify from the list.
- 6 Modify the template as needed.
Users can only modify a template where they belong to the authoring group.
- 7 Click Save.

Deleting work order templates

Only users with Work Order Master permissions in a company's support group can delete work order templates for the authoring group.

► To delete work order templates

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Work Order > Work Order Template, and then click Open.
The Work Order Template form appears.

- 3 Switch the form to search mode.
- 4 Enter the search parameters to find the template you want to delete, and then click Search.

A list of templates appears.

- 5 Select the template to delete.

Users can only delete a template if they belong to the authoring group.

- 6 Delete the template using one of the following methods:

- Change to Status field value to Delete and then save the change template.
- If you are a user with AR Admin permissions, choose Actions > Delete in BMC Remedy User, or click the Delete button below the results list in a browser.

Configuring work order rules

NOTE

To configure work orders, you must have Work Order Config permissions. This role grants access to modify work order configuration forms, task templates, and assignments. You also implicitly receive Task Process Config and SRM Administrator computed permissions.

You use the Work Order Configuration Rules form to configure the method of assignment to automatically select a work order assignee (not the assigned support group, but the individual within the group) for work orders. Each company defined in the Company form can have its own assignment rules.

You can configure assignment for one company, or you can configure it for all companies by using the Global option. When Work Order Management uses assignment, for example, when it assigns a work order, the Assignment Engine checks the assignment rules for the approver's company. If no rules are found, it uses the rules defined for Global.

Figure 3-32: Example of a work order rule

► To configure work order rules

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Work Order > Rules, and then click Open.

The Work Order Configuration Rules form opens.

- 3 To modify an existing rule, search for the appropriate rule, then open it.

— NOTE —

Some work order rules settings are automatically defined during installation.

- 4 Select the company for which you want to configure assignment, or select the Global option.

Selecting Global configures assignment for all companies.

- 5 Select Enabled if you want this assignment to be available to users. You can also select the following options:

- Proposed
- Offline
- Obsolete
- Archive
- Delete

- 6 To use the assignment engine to automatically assign work orders to individuals, perform the following steps:
 - a Set Assignment Engine Integration to Yes.
 - b Select the appropriate Assignment Process.

The following table describes the available assignment processes:

Assignment Process	Description
Capacity	The capacity for each person is specified in the Capacity Rating field on the People form. The assignment process is a ratio-based method. For example, if person A has a capacity of 100 and person B has a capacity of 200, person B can handle twice as many tickets as person A; the assignment engine assigns two tickets to B, then assigns one ticket to A.
Number	The People form tracks the number of tickets assigned to the person. The number assignment process selects the person with the least number of tickets already assigned.
Round Robin	The People form keeps track of the last time the person received an assignment. The round robin assignment process selects the person who was least recently assigned a change request.

For information about configuring the assignment engine, see “Working with SRM auto-assignment configuration” on page 128.

- 7 In the Create Service Request on Submit field, select which action occurs when a work order is submitted.

The options are No (the default setting) and Yes. If set to Yes, when a user submits a work order, a corresponding service request is created. The customer can view this service request, which indicates the status, through the Request Entry console.

- 8 Enter information in any remaining optional fields.
- 9 Click Save.

Configuring service targets for SRM

Three goals for service targets are shipped with the BMC Service Request Management application:

- Service Request Total Time—This goal sets a time to complete the request after it is submitted.
- Service Request Process Time—This goal sets a time to complete the request after it has been approved.
- Service Request Approval Time—This goal sets a time to approve the request after it has been submitted.

These goals have been created in the SLM application as templates. You can override any of these setting using the Configure Service Target Defaults form. This option is available only if you have BMC Service Level Management installed.

► **To configure service targets defaults**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Applications Settings list, choose Service Request Management > Service Level Management > Service Target Defaults, and then click Open.

The Configure Service Target Defaults form appears.

Figure 3-33: Configure Service Target Defaults form (for SRM)

BMC REMEDY SERVICE MANAGEMENT - Service Level Management

Configure Service Target Defaults

Defaults for Lookup

AppliesTo	GoalType	SLMStatus	TargetHours	TargetMinutes	Cost	BusinessEntity
Service Request	Service Request Total Time	Enabled	5	5	100.00 USD	
Service Request	Service Request Approval Time	Enabled	5	5	200.00 USD	
Service Request	Service Request Process Time	Enabled	4	4	300.00 USD	

Delete

Applies To*

Service Request

Goal Type*

Service Request Total Time

Status*

Enabled

Hours*

5

Minutes*

5

Impact Cost

100.00 USD

Per Minute

Business Entity

Save

Close

Help

Measurement Template

SRM Time to Completion

- 3 You can customize the service targets by selecting a service target and entering information in the following fields:

Field	Description
Applies To	The application that the service target applies to, in this case it is Service Request.
Goal Type	You can select from the three SRM goal types shipped with the application: <ul style="list-style-type: none">■ Service Request Total Time■ Service Request Process Time■ Service Request Approval Time.
Status	The status of the service target can be: <ul style="list-style-type: none">■ Enabled—The service target is saved.■ Disabled—The service target cannot be attached to any new requests; however, the measurements continue for any exiting requests.■ Invalid—The service target is no longer in operation.

Field	Description
<ul style="list-style-type: none"> ■ Hours ■ Minutes 	The time within which the request must have a response. After this time the service target is considered missed.
Impact Cost	The estimated costs per minute to the business if the service target is missed.
Business Entity	The periods when the service target measurements are suspended, for example, during a holiday when the company is closed.
Measurement Template	Predefined templates that specify when the measurements start and finish. For example, for a Service Request Total Time, the measurements start when the Status is In Progress and end when the Status is Completed; a measurement for Service Request Approval Time starts when the Status is Waiting Approval and end when the Status is Completed.

4 Save your changes.

- For more information about creating templates and business entities, see the *BMC Service Level Management 7.1.00 Configuration Guide*.
- For more information about creating service targets, see the *BMC Service Level Management 7.1.00 User's Guide*.

Configuring SRM approvals

This section describes how to configure SRM approvals. Configuration tasks are performed from the Application Administration Console.

NOTE

Only users with SRM Administrator permissions can configure SRM approvals.

The following topics are provided:

- Configuring approvals with SRM 2.2.00—Quick Start (page 92)
- Configuring SRM approvals (page 102)
- SRM approval state transitions (page 102)
- Default global approval processes (page 106)
- Understanding the relationship between company and global approval process configuration (page 108)
- Creating people and mapping roles for approvals (page 114)
- Approver mappings (page 115)
- Adding approvers to SRDs (page 124)

Configuring approvals with SRM 2.2.00—Quick Start

To get approvals up and running quickly with SRM 2.2.00, you must perform the following steps. Here you are using the default approval process configuration records that are preconfigured for you. The rest of the sections in this section provide details that support these steps.

— **IMPORTANT** —

This section presupposes that you know how to define users in the People form, create SRDs, create service requests, and so on.

You should find this overview section helpful *before* you dig into the details of how the Approval Server works with SRM.

Table 4-1: Quick start to approvals in SRM

Step	Action	Menu Item	Comments
1	Configure approvers in the People form.	Custom Configuration > Foundation > People > People	For detailed information, see the <i>BMC Remedy IT Service Management 7.0 Configuration Guide</i> .
2	Review the approval process configuration records that are installed by default for global use.	Custom Configuration > Foundation > Advanced Options > Approval Process Configuration	For more information, see “Default global approval processes” on page 106.
3	Review the states in SRM that drive the approval process.	Custom Configuration > Foundation > Advanced Options > Approval Process Configuration	For more information, see “Approval states on the Status Flow tab” on page 113.
4	Create an SRD, and approve it.		For more information on the Service Catalog Manager role, see the <i>BMC Service Request Management 2.2.00 Administrator's Guide</i> .
5	Create a service request, and approve it.		For more information on creating service requests in the Request Entry Console, see the <i>BMC Service Request Management 2.2.00 Administrator's Guide</i> .

Step 1 Define your approvers in the People form. (In the Application Administration Console, choose Custom Configuration > Foundation > People > People.)

Figure 4-1: Defining approvers in the People form

The example uses three different logins to test the interactions between SRM and the Approval Server. You should create three different users in the People form with Service Request User permissions. Only John SRM has Request Catalog Manager permissions.

User	Application Permissions	Support Group	Manager
Joe User	Service Request User	N/A	Alice Approver (defined in the People form)
Alice Approver	Service Request User	N/A	N/A
John SRM	<ul style="list-style-type: none"> Request Catalog Manager Service Request User 	IT Hardware	John SRM (Service Catalog Manager)

For more information, see “Creating people and mapping roles for approvals” on page 114.

- Step 2** Review the approval process configuration records that are installed by default for global use. (In the Application Administration Console, choose Custom Configuration > Foundation > Advanced Options > Approval Process Configuration.)

Figure 4-2: Reviewing the global approval process configuration records

Approval Process Configuration (Modify)

Approval Process Configuration - Matching

Approval Definition ID	Form Name*	Begin	Company*	Phase Name*	Des
APD000000000007	SRM:Request	Waiting Approval	- Global -	SYSTEM PHASE	Ad H
APD000000000010	SRM:Request	Waiting Approval	- Global -	Service Request - Level	Serv
APD000000000011	SRM:Request	Waiting Approval	- Global -	Service Request - Management Chain	Serv
APD000000000008	SRD:ServiceRequestDefinition	Request for Approval	- Global -	SYSTEM PHASE	Ad H
APD000000000009	SRD:ServiceRequestDefinition	Request for Approval	- Global -	Service Request Definition - Level	SRD

BMC REMEDY IT SERVICE MANAGEMENT

Help

bmcsoftware

Approval Process Configuration

Form Name*

SRD:ServiceRequestDefinition

...

Description

Ad hoc approval process for Service Request Definition.

Company*

- Global -

...

Status*

Enabled

...

Approval Process

Status Flow

Additional Qualifications

Phase Name*

SYSTEM PHASE

...

Default Process Name

...

Process Name*

Service Request Definition - Ad Hoc

...

System Approval Flag

...

Process Type

Ad Hoc

...

Sort Order

...

Impacts Approval Status*

Yes

...

Only two approval process configuration records are enabled by default:

- Service Request Definition - Ad Hoc
- Service Request - Management Chain

These global configuration records specify which approval state occurs next if an approval is approved or rejected, or if no approvers are defined.

NOTE

Here you are *not* customizing the approval process configuration records or creating new configuration records from scratch.

For more information, see “Default global approval processes” on page 106.

Step 3 Click the Status Flow tab in the approval process configuration records to review the states that drive the approval process.

Figure 4-3: Reviewing the status flow of the approval process configuration record

The screenshot shows the 'Approval Process Configuration (Modify)' window in BMC Remedy IT Service Management. At the top, there is a table titled 'Approval Process Configuration - Matching' with columns: Approval Definition ID, Form Name*, Begin, Company*, Phase Name*, and Des*. The table lists several entries, with 'SRD:ServiceRequestDefinition' highlighted. Below the table, the main configuration area for 'SRD:ServiceRequestDefinition' is shown. It includes fields for 'Form Name*' (SRD:ServiceRequestDefinition), 'Company*' (- Global -), and 'Status*' (Enabled). A 'Description' field contains 'Ad hoc approval process for Service Request Definition.' Below these fields are tabs for 'Approval Process', 'Status Flow', and 'Additional Qualifications'. The 'Status Flow' tab is active, showing a flow diagram with four states: 'Begin' (Request for Approval), 'Approved' (Deployed), 'Rejected' (Rejected), and 'No Approvers' (Deployed). Each state has a 'Status Reason' dropdown menu.

For example, you see the Service Request Definition - Ad Hoc configuration record defines four different approval actions and resulting SRD states that drive the progress of the SRD.

Table 4-2: Approval and SRD states

Approval state	SRD state	Approval Server action to the SRD
Begin	Request for Approval	When the Status of the SRD is Request For Approval, the approval process starts.
Approved	Deployed	If the SRD is approved, its Status becomes Deployed.
Rejected	Rejected	If the SRD is rejected, its Status changes to Rejected.
No Approvers	Deployed	If there are no approvers defined for the SRD (that is, if no approvers are mapped to this configuration record), its Status changes to Deployed.

For more information, see “Approval states on the Status Flow tab” on page 113.

Step 4 When John (the Service Catalog Manager) creates an SRD, he must move the SRD from the Draft state to Request for Approval.

Figure 4-4: Viewing important approval information in the SRD

The screenshot displays the 'Service Request Definition (Modify)' form in BMC Service Request Management. The form is divided into several sections:

- Service Request Definition ID:** SRD0000000000058
- Version:** [Empty]
- Status:** Request for Approval (highlighted with a red box)
- Company:** Acme Inc.
- Title:** Move new employee to office
- Description:** Use this service to move a new employee to their office, set up their phone, buy them a New Office
- Navigation Categories:**
 - Category 1*: Cat1_en_US2
 - Category 2: [Empty]
 - Category 3: [Empty]
- Effective Dates and Times:**
 - Start Date: 10/24/2007 12:00:00 a.m.
 - End Date: [Empty]
- Customer:**
 - First Name+: John
 - Last Name+: SRM
- Request Catalog Manager:**
 - Company*: Acme Inc.
 - Name*: John SRM (highlighted with a red box)
- Attachment:**

File Name	Max Size	Attach Label
Attachment...		

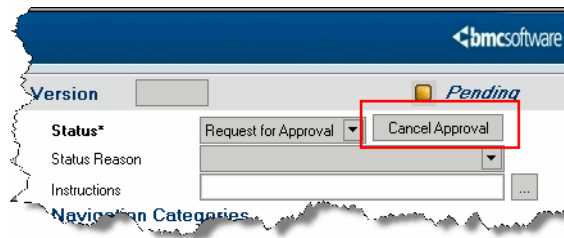
- Log in to SRM as the Service Catalog Manager.
- Create an SRD by entering all the required information.
- In the Service Request tab, make sure that the Needs Flag option is set to Yes for Service Request Approval (the default option).
- In the Approvals tab, make sure that the Set using Approval Engine option is selected (the default option).
- Save your changes.
- Change the status of the SRD to Request for Approval.

Based on the default approval process, the approver of the Service Request Definition - Ad Hoc configuration record is the Request Catalog Manager (here it is John SRM). You can verify this behavior in two ways:

- Clicking the Approvers tab in the Service Request Definition form when the SRD reaches the Request for Approval state
- Opening the approval signature record in Approval Central.

- g If needed, you can cancel the approval.

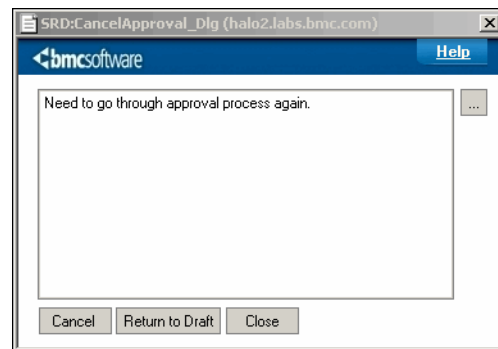
Figure 4-5: Cancelling approvals (before the SRD is deployed)



When you cancel an approval, you are prompted with several options.

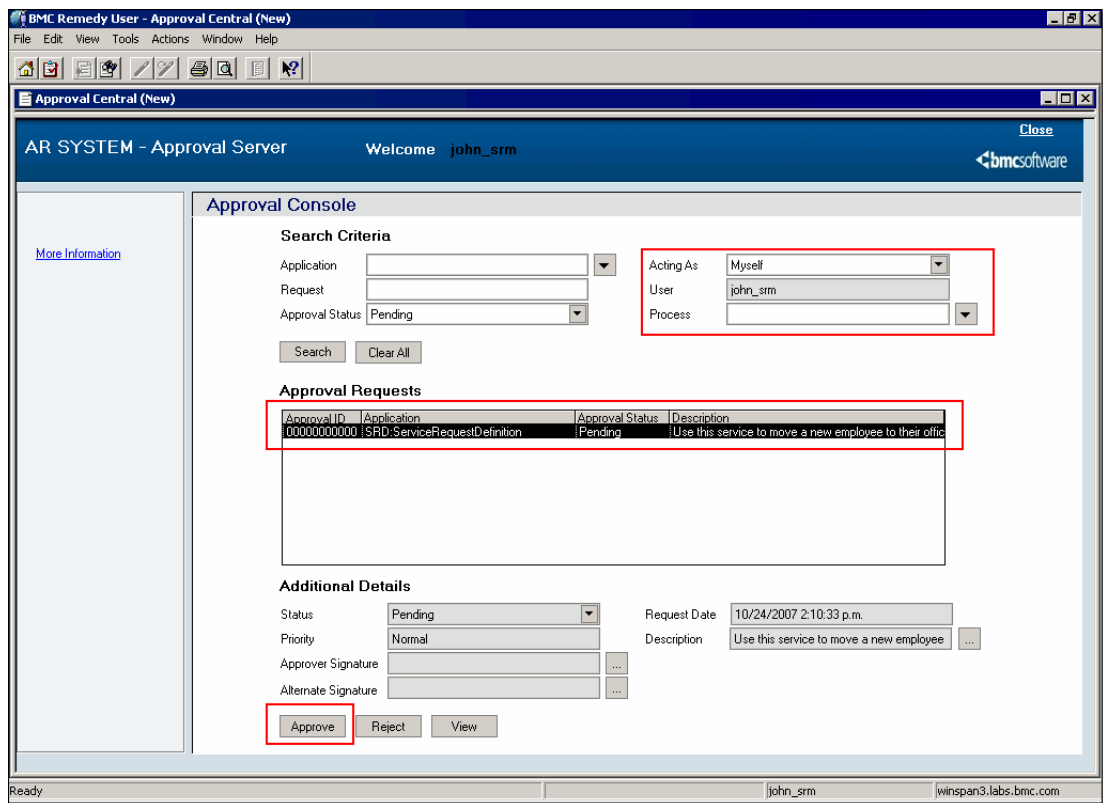
- h Enter the reason for cancelling the approval, and click Return to Draft.

Figure 4-6: Returning SRD to Draft state



- i One more time, change the status of the SRD to Request for Approval.
- j Open Approval Central, and then approve the SRD.

Figure 4-7: Approving the SRD in Approval Central



NOTE
The 7.1.00 version of Approval Central is shown.

You can see that the SRD is in the Pending state and that John SRM is assigned to approve the SRD.

k Return to the SRD, and then refresh it.

Figure 4-8: SRD after approval

The screenshot shows the 'Service Request Definition (Modify)' window in BMC Service Request Management. The window is divided into several sections. At the top, there's a header with 'BMC SERVICE REQUEST MANAGEMENT' and 'Service Request Definition'. Below this, there's a navigation pane on the left with 'Functions' and 'Other Applications'. The main area is divided into two columns. The left column contains fields for 'Company*', 'Locale', 'Title*', 'Level', 'Description*', and 'Keywords'. The right column contains fields for 'Status*', 'Status Reason', 'Instructions', 'Navigation Categories', 'Category 1*', 'Category 2', and 'Category 3'. The 'Status*' field is set to 'Deployed', and the 'Online' button is highlighted. Below these fields, there's a tabbed interface with 'Definition', 'Service Request', 'Entitlements', 'Work Info', 'Approvals', and 'SLM'. The 'Definition' tab is active, showing 'SRD Details' and 'Effective Dates and Times'. The 'SRD Details' section includes 'Request Type*' (Standard), 'Custom Template', 'Process Template' (WD PROCESS APPROVALS-ASSIGNMENT), 'Expected Cost' (0.00 USD), 'Price' (0.00 USD), 'Turnaround Time' (0 Hours), 'Account Number', 'System Request' (Left Navigation), and 'Business Service'. The 'Effective Dates and Times' section includes 'Start Date' (10/24/2007 12:00:00 a.m.) and 'End Date'. The 'Customer' section includes 'First Name+' (John) and 'Last Name+' (SRM). The 'Request Catalog Manager' section includes 'Company*' (Acme Inc.) and 'Name*' (John SRM). The 'Attachment' section includes a table with columns for 'File Name', 'Max Size', and 'Attach Label', and a row for 'Attachment...'. At the bottom, there's a checkbox for 'Create Business Process'.

The Status of the SRD automatically moves to Deployed.

This behavior of the SRD is *exactly* as described in Table 4-2 on page 95. By default, when an SRD in the Request for Approval state is approved, it moves to the Deployed state and it is now online. Users can access this SRD from the Request Entry Console.

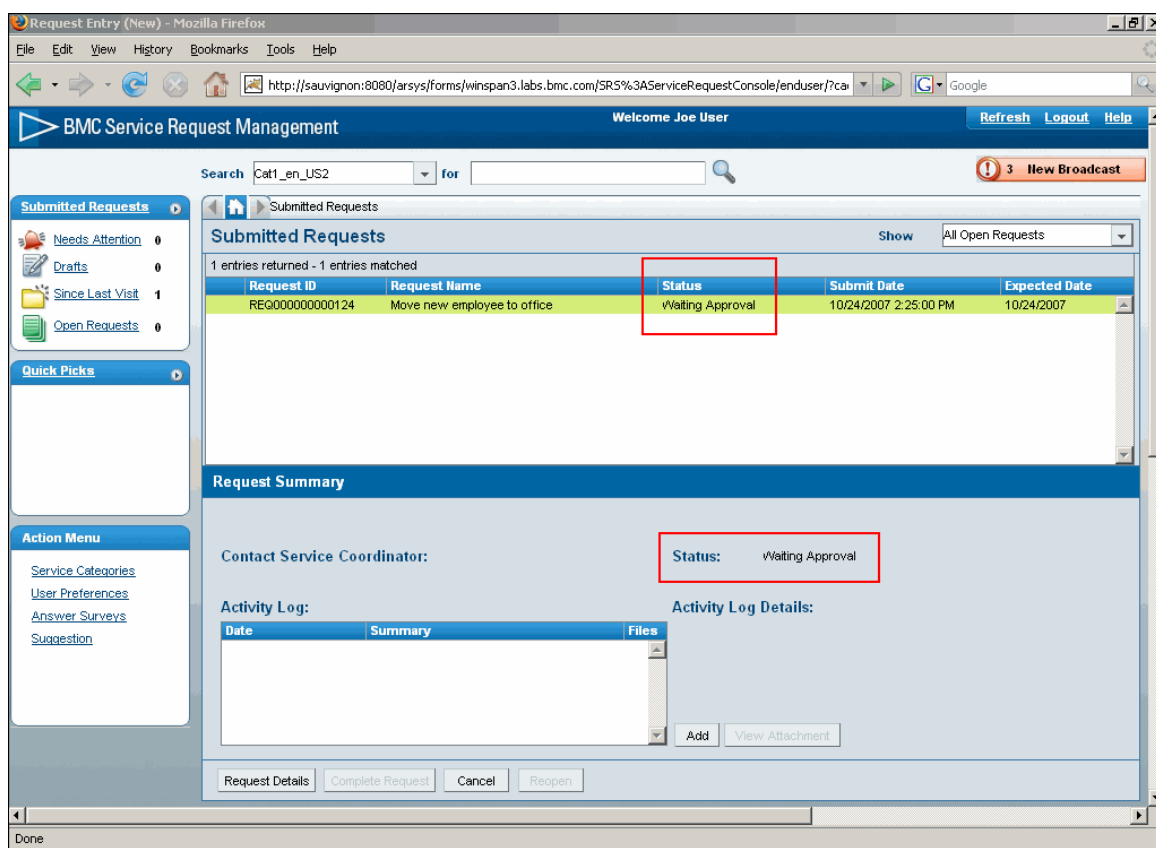
NOTE

After this final approval, the default approval cycle is finished for the SRD.

Step 5 Create a service request, and then approve it.

- a Log in to the AR System server as Joe User in a separate user tool or browser.
- b Open the Request Entry Console, search for the SRD offering, and then submit it.

Figure 4-9: Service request waiting approval in the Request Entry Console



As shown, the Status of the submitted request is Waiting Approval. Based on the default approval process, the approver of the Service Request Management Chain configuration record is the requester's manager.

- c Log in to the AR System server as Alice Approver in a separate user tool or browser, open Approval Central, and then approve the service request.

Figure 4-10: Approving the service request in Approval Central

Approval Central (New)

AR SYSTEM - Approval Server Welcome alice_approver [Close](#)

Approval Console

[More Information](#)

Search Criteria

Application: Acting As: User: Process:

Request:

Approval Status:

Approval Requests

Approval ID	Application	Approval Status	Description
0000000000000119	SRM Request	Pending	Move new employee to office

Additional Details

Status: Request Date: Description:

Priority:

Approver Signature:

Alternate Signature:

- d As Joe User, open the Request Entry Console and view your service request. You can see that the service request has been approved and the Status moved to Planning.

Figure 4-11: Service request after approval

Request Entry (New) - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://lombo:8080/arsys/forms/halo2.labs.bmc.com/SRS%3AServiceRequestConsole/enduser/?cacheid=d3 Google

BMC Service Request Management Welcome Joe User [Refresh](#) [Logout](#) [Help](#)

Search: Add New Employee for

Submitted Requests

Needs Attention: 0 Drafts: 0 Since Last Visit: 1 Open Requests: 1

Submitted Requests Show All Open Requests

1 entries returned - 1 entries matched

Request ID	Request Name	Status	Submit Date	Expected Date
REQ0000000000019	Install office for new employee	Planning	10/25/2007 12:47:14 PM	10/25/2007

NOTE

After this final approval, the default approval cycle is finished for the service request.

Configuring SRM approvals



SRM 2.2.00 is shipped with best practice approval process configuration records that are predefined and loaded for you with the application. The approval process configuration records for managing SRDs and service requests are tightly integrated with the AR System Approval Server. The Approval Server is shipped with the Action Request System server and should be installed on the same machine as SRM.

NOTE

You can define additional approval process configuration records and adapt them to your business process instead of creating new ones from scratch.

To manage the SRM approval process, you must understand at a high-level the different state transitions that an SRD or service request must pass through. You can also configure approval configuration records for status changes, map approval processes to approval phases, and define approvers for each phase.

You use the Application Administration Console to configure approvals. If you do not want to use the default SRM approval configuration records, the three main steps for configuring *additional* approvals for SRM are:

- Step 1 Setting up the approval processes and rules in the Approval Server—Understanding the relationship between company and global approval process configuration (page 108).
- Step 2 Mapping the approval processes to the companies and categorizations by state—Approval states on the Status Flow tab (page 113).
- Step 3 Setting up approvers for the different phases—Approver mappings (page 115).

SRM approval state transitions

NOTE

The following example shows how approvals work with SRDs. But the process is essentially the same for service requests.

When an SRD or service request moves from state to state, the default workflow queries the Approval Process Configuration form to find out which approval process to use, and then executes it.

- If approval processes have been defined for a particular company, they are used and the approval process continues. (For more information, see “Understanding the relationship between company and global approval process configuration” on page 108.)
- Otherwise, the default global approval processes are used and the approval process continues.

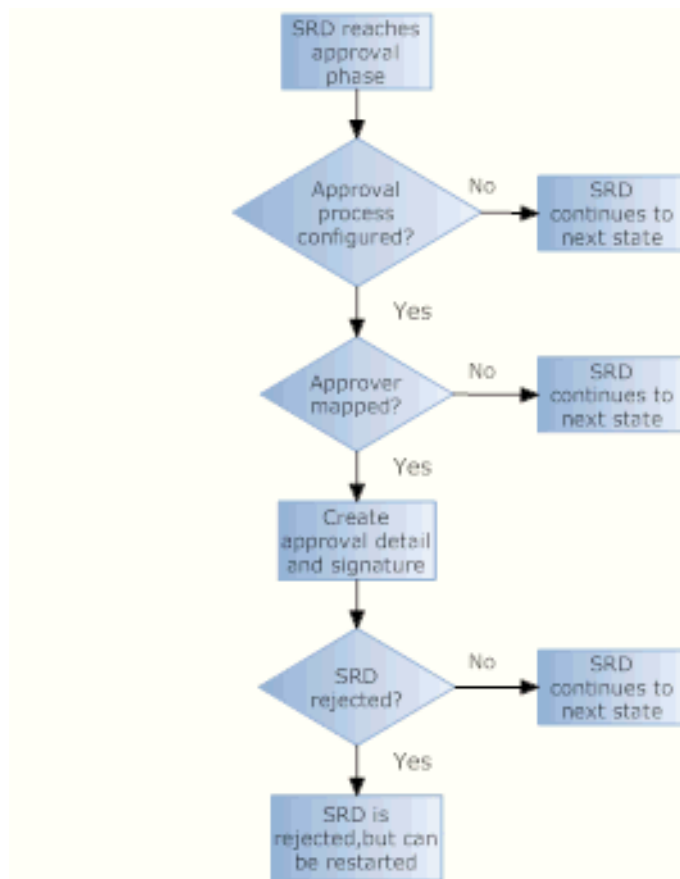
For example, when an SRD moves from the Draft state into the Service Request Definition - Level phase, the Approval Server checks the approval process (Service Request Definition - Level), one of the five approval processes enabled by default to work with SRM.

NOTE

For a list of default approvals shipped with SRM, see “Default global approval processes” on page 106.

The Approval Server starts the approval process, and then executes the rules in the order of the approvers who are mapped to the approval phase.

Figure 4-12: SRD approval process



The rules contain the qualifications that set up approvers for each phase of that process, and create the approval detail and signature records for the SRD.

If there are no approvers mapped to the Service Request Definition - Level process, the SRD moves to the next state.

If you enabled the Service Request Definition - Level process, you must set up the approvers using the Approver Mappings form, as described in the examples in “Creating individual mappings to work with level-type approval processes” on page 118 and “Creating group mappings to work with level-type approval processes” on page 121. The rules query this form, using the appropriate criteria, find the appropriate approvers, and then add them to the SRD record as the approvers. (You can view the approvers on the Approvers tab of the SRD.)

When the approver approves or rejects the SRD, the rules again execute and sets the next status defined in the Approval Process Configuration form. (See “Approval states on the Status Flow tab” on page 113.) Based on the process type, the approval server continues until there are no approvers found for the process.

When the process is a level process type, the Approval Server first sends the SRD or service request to the current level approvers. After the SRD or service request is approved, the Approval Server sends it to the next level of approvers. On the Approvers tab, only the current level of approvers are displayed even if approvers are specified for several levels.

NOTE

You can configure additional processes for your company, as needed. For example, you could create a process that SRDs require approvals when they reaches the Pending state. For more information, see “Setting up approval process configuration records for your company” on page 109.

Approval process types

For detailed information about defining the approval processes and rules in the AR System Approval Server, see the *BMC Remedy Approval Server 7.1.00 Guide for Users and Administrators*.

SRM provides the following approval process types:

- **Ad Hoc**—Provides routing authority to each approver without requiring the administrator to create approver mappings for every individual or role. The Ad Hoc approval process type is used in the Service Request Definition - Ad Hoc with the Service Catalog Manager as the first approver.
- **Level**—Associates individual approvers, or groups of approvers, for example, with SRD levels and navigational categories.
- **Service Request Management Chain**—If you configure an approval process that includes the Service Request Management Chain process, it uses the Requester For's manager as the approver.

NOTE

Rule-based approvals are not included by default in SRM.

For example, if Joe in your shipping department wanted to upgrade the operating system on his computer and created a service request that required the Service Request Management Chain approval process, it would be sent to Joe's manager for approval. Joe's manager is not likely to be a member of the IT organization, and therefore might not be aware of additional issues surrounding Joe's request. This process is workflow-driven, triggered from the manager data stored in the People form.

Figure 4-13: Service Request Management Chain approval process

The screenshot shows the 'Approval Process Configuration (Modify)' window in BMC Remedy IT Service Management. The window has a blue header with 'BMC REMEDY IT SERVICE MANAGEMENT' and a 'Help' button. The main content area is titled 'Approval Process Configuration'. It contains several fields and tabs. The 'Form Name*' field is 'SRM:Request', 'Company*' is 'Global', and 'Status*' is 'Enabled'. The 'Description' field contains 'Service Request - Management Chain approval process'. Below these are three tabs: 'Approval Process', 'Status Flow', and 'Additional Qualifications'. The 'Approval Process' tab is active, showing fields for 'Phase Name*' (Service Request - Management Chain), 'Process Name*' (Service Request - Management Chain), 'Process Type' (Parent-Child), and 'Impacts Approval Status*' (Yes). To the right of these are 'Default Process Name', 'System Approval Flag', 'Max Approval Levels' (set to 2), and 'Sort Order'. At the bottom are 'Save' and 'Close' buttons.

If you select the Service Request Management Chain process, the Max Approval Levels field appears in the Approval Process Configuration form. You can specify how deep you want to go in the management chain. For example, if you use 0 (the system default), the chain extends only to Joe's manager. If you enter 1, the manager of Joe's manager must approve the upgrade, and so on.

NOTE

For SRM, you are allowed only one record per company with the process type of Parent-Child. If an administrator attempts to create a second approval phase with the Service Request Management Chain (Parent-Child) process type selected, the following error message is displayed: Only one 'Approval Phase' for '\$Company\$' can be set to use the 'Parent-Child' 'Process Type'. In addition, you should create only one unique approval process record per phase. Otherwise, your approvals will not work as expected.

Default global approval processes



SRM ships with five best practice approval processes designed for global use. These “best practice” processes are based on sample data like companies and support groups provided in the Foundation. There is no separate configuration data for approvers. Customers can always modify the sample processes, or inactivate them and create new approval processes and rules based on their business needs.

— **IMPORTANT** —

Even though five approval process configuration records are shipped with SRM, only two are enabled by default, one approval configuration record for SRDs and one for service requests. Do *not* enable all these approval configuration records at the same time. If you do, your approvals will not work as described. If you are going to modify the default approval settings, you must enable only one configuration record per category and offline the others. You must enable only one approval configuration record for SRDs and only one for service requests.

The preconfigured processes are as follows:

Process Name	Definition
Service Request Definition - Ad Hoc	The SYSTEM PHASE Ad Hoc approval process for SRDs. The initial approver of the Ad Hoc process is specified as the Request Catalog Manager of the SRD. It is up to the Service Catalog Manager to specify the next approvers after they approve the catalog offering. By default, the status of this approval process is Enabled.
Service Request Definition - Level	The SRD level process uses the data configured in the Approval Mapping form to determine approvers. By default, the status of this approval process is Offline.
Service Request - Management Chain	The service request management chain parent-child process uses the user's management chain to determine approvers. By default, the status of this approval process is Enabled.
Service Request - Ad Hoc	The SYSTEM PHASE Ad Hoc approval process for service requests. The initial approver of the Ad Hoc process is specified as the manager of the user who is requesting the service. It is up to the manager to specify the next approvers after they approve the service request. By default, the status of this approval process is Offline.
Service Request - Level	The service request level process uses the sample data configured in the Approval Mapping form to determine approvers. By default, the status of this approval process is Offline.

Viewing approval processes in the Approval Server (advanced information)

For a deeper understanding of how these global approval processes are defined in the Approval Server, you can open the AP:Administration form and view them from the Process tab. For example, the Service Request - Level process is highlighted. To access the AP:Process Definition form from the AP:Administration Console, click the Process tab, select a process, and then click the View button.

Figure 4-14: AP:Administration Console—Process tab

Process Name	Rule	Notification	Role	Form	Administrator	Alternate	Process Type	Status	Process Instance ID
Change Level - Review	CHG:Infrastructure Change						Level	Active	Change Level - Revi
Change Level CI - Business	CHG:Infrastructure Change						Level	Active	Change Level CI - Bu
Change Level CI - Close Down	CHG:Infrastructure Change						Level	Active	Change Level CI - CI
Change Level CI - Implementation	CHG:Infrastructure Change						Level	Active	Change Level CI - Im
Change Level CI - Review	CHG:Infrastructure Change						Level	Active	Change Level CI - Re
Change Level IA - Business	CHG:Infrastructure Change						Level	Active	Change Level IA - Bu
Change Level IA - Close Down	CHG:Infrastructure Change						Level	Active	Change Level IA - CI
Change Level IA - Implementation	CHG:Infrastructure Change						Level	Active	Change Level IA - Im
Change Level IA - Review	CHG:Infrastructure Change						Level	Active	Change Level IA - Re
Change Management Chain	CHG:Infrastructure Change						Parent-Child	Active	Change Management
Purchase Requisition	AST:PurchaseRequisition						Ad Hoc	Active	AP0050563C10148y
Service Request - Ad Hoc	SRM:Request						Ad Hoc	Active	AG00137260F2FDQ
Service Request - Level	SRM:Request						Level	Active	AG00137260F2FDSI
Service Request - Management Ch	SRM:Request						Parent-Child	Active	AG00137260F2FDze
Service Request Definition - Ad Ho	SRD:ServiceRequestDefinition						Ad Hoc	Active	AG00137260F2FDhE
Service Request Definition - Level	SRD:ServiceRequestDefinition						Level	Active	AG00137260F2FD53

View Search Create Delete Refresh

IMPORTANT

You should avoid modifying processes, rules, roles, and so on directly in the AP:Administration form, *until* you have exhausted all the configuring options in the ITSM Foundation forms.

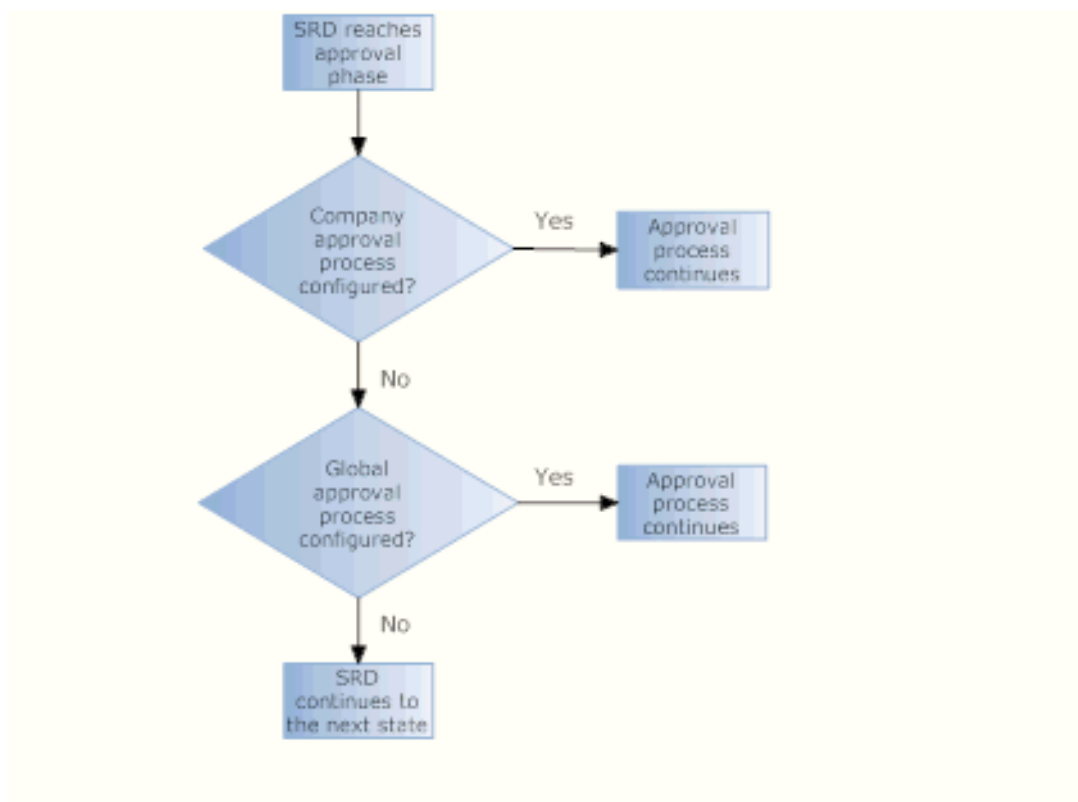
NOTE

You can create additional approval process configuration records and adapt them to your business process instead of creating new ones from scratch. But if necessary, you *can* create new processes and rules. For detailed information about defining additional approval processes and rules in the AR System Approval Server, see the *BMC Remedy Approval Server 7.1.00 Guide for Users and Administrators*.

Understanding the relationship between company and global approval process configuration

The SRM application defines two default approval phases. These are designed for “global” use, and most companies should not have to create additional approval configuration records.

Figure 4-15: Relationship of company approval process configuration records to global configuration



However, you *can* use the Approval Process Configuration form to create additional approval process configuration records, either for global use or for the Company field on the SRD record.

IMPORTANT

Do *not* modify the predefined best practice phases. If you need alternate process configuration records, create copies of these processes. For detailed instructions, see “Setting up approval process configuration records for your company” on page 109.

If you create company-based approval processes, these take precedence over global configuration. When an SRD or service request reaches an approval phase, the approval server first evaluates any company configuration records you have created and the global configuration records are ignored. If there are no company configuration records, the approval server then uses the global configuration records.

Setting up approval process configuration records for your company

When you create a copy of the approval process (for example, the Service Request - Level approval process) and then save it for your company, the system automatically creates the remaining approval process configuration records for your company, based on the default global settings. You can edit these approval processes as needed.

IMPORTANT

You can have only one record in a given phase. You are allowed only one *enabled* phase approval record for global use or for each company. For example, you can set up one enabled Service Request Definition - Ad Hoc approval for SRDs and one enabled Service Request - Level approval for service requests. You can create additional phase approval processes as needed, but they must be offline or in another state (for example, Proposed).

In addition, after you have created these company-specific approval process configuration records, *the global processes are no longer functional for your company*.

As a result, if you disable the Service Request - Level approval process configuration record for your company and a service request reaches the Service Request - Level phase, the Approval Server will skip the company Service Request - Level approval phase (because it is offline) *and* ignore the global Service Request - Level phase (even if it is enabled), and the service request will continue to the next state. To revert to the global processes, you must offline *all* the company approval process configuration records.

But remember that, in a multi-tenancy environment, you can combine approval processes as needed. That is, you might decide ABC Company needs custom approval processes, but DEF Company can use the default global processes.

Approval configuration records are mapped for SRDs and service requests using navigational categories, price information, and so on, so you can configure several configuration records for a category or company.

► **To set up approval process configuration records for your company**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 Choose Foundation > Advanced Options > Approval Process Configuration, and then click Open.

The Approval Process Configuration form appears in New mode.

Figure 4-16: Approval Process Configuration form

The screenshot shows the 'Approval Process Configuration (Modify)' window in BMC Remedy IT Service Management. The window has a blue header with the BMC logo and a 'Help' button. The main content area is titled 'Approval Process Configuration' and contains several sections. The first section has fields for 'Form Name*' (set to 'SRD:ServiceRequestDefinition'), 'Company*' (set to 'Pylon'), and 'Status*' (set to 'Enabled'). There is also a 'Description' field set to 'SRD Level Approval Process'. Below this is a tabbed interface with 'Approval Process', 'Status Flow', and 'Additional Qualifications' tabs. The 'Approval Process' tab is active and contains fields for 'Phase Name*' (set to 'Service Request Definition - Level'), 'Process Name*' (set to 'Service Request Definition - Level'), 'Process Type' (set to 'Level'), 'Impacts Approval Status*' (set to 'Yes'), 'Default Process Name' (set to 'Service Request Definition - Level'), 'System Approval Flag' (set to 'No'), and 'Sort Order' (set to '1'). At the bottom are 'Save' and 'Close' buttons.

- 3 Enter information in the following fields:

Field Name	Action and description
Form Name	<p>Select a form name.</p> <p>This is the form from which requests will be generated. For SRM, there are only two forms: SRM:Request and SRD:ServiceRequestDefinition.</p> <ul style="list-style-type: none">■ Select SRM:Request if you are setting up approvals for service requests.■ SRD:ServiceRequestDefinition if you are setting up approvals for SRDs. <p>Note: When you select a form name, category and total cost fields appear in the form, on the Additional Qualifications tab. You will use these fields to map the approval configuration record to the SRD categories for SRDs and service requests.</p>

Field Name	Action and description
Company	<p>Select the company that will be using this approval configuration record.</p> <p>This name maps to the name specified in the Company field on the Delivery tab of the SRD record.</p> <p>Note: SRM supports multi-tenancy, which means that you can configure different approval configuration records for different companies.</p> <p>If you are defining an ad hoc approval, select Global. This option makes sure that the service request goes to the Service Catalog Manager of the SRD, who would then either approve the request or route it appropriately.</p>
Status	<p>Select a status for the approval configuration record.</p> <p>The status must be set to Enabled for the approval configuration record to execute.</p> <p>If the process should not be available in SRM, you can select the appropriate status: Proposed, Offline, Obsolete, Archived, or Delete.</p>
Description	Enter a description of this approval configuration record.
Phase Name	<p>Indicate at which phase of the request this approval configuration record should be executed by entering text in this field.</p> <p>The phase name gets associated with the company for which this approval is being defined.</p>
Process Name	<p>Select the process that should be used for this approval configuration record from the list of processes you configured.</p> <p>See “Understanding the relationship between company and global approval process configuration” on page 108 for more information.</p>
Process Type	A preconfigured corresponding process type appears when you select the process name.
Impacts Approval Status	Select Yes or No to indicate whether this approval configuration record impacts the approval status of the service request or SRD.
Default Process Name	<p>Select another process from the menu list.</p> <p>Note: This setting is optional and you should not set it, unless you specifically need it.</p> <p>In general, if no approvers are found for the Process Name, then the Default Process Name is checked, to see if any approvers can be found.</p> <p>If you cleared the Default Process Name field, when an SRD or service request reached the Service Request Definition - Level phase and values did not match the Approver Mappings, the SRD would not have <i>any</i> fallback processes to use. The SRD would then move ahead to the next state.</p>
System Approval Flag	Selecting Yes means that no approvers can be mapped to this process on the Approval Mapping form. By default, this field is empty.
Sort Order	If you have multiple approval configuration records for a specific category, you might want to sort the execution order.

- 4 Click the Status Flow tab to set up the approval cycle for the specific service request or service catalog.

See “Approval states on the Status Flow tab” on page 113 for more information.

- If you are configuring the approval cycle for an SRD, then the states that appear in the Status menu lists are derived from the Status field of the SRD form.
- If you are configuring the approval cycle for a service request, then the states that appear in the Status menu lists are derived from the Status field of the Service Request form.

Figure 4-17: Approval Process Configuration form—States of SRD Ad Hoc SYSTEM PHASE approval

	Begin	Approved	Rejected	No Approvers
Status*	Request for Approval	Deployed	Rejected	Deployed
Status Reason				

For example, an SRD starts in the Request for Approval state. The Begin column indicates the state that starts the approval process.

If the SRD is approved, its Status changes to Deployed (as indicated in the Approved column).

If the SRD is rejected, its Status changes to Rejected (as indicated in the Rejected column). But you might decide instead that the SRD should move back to the Pending state and that the Status Reason should be More Information, or the Status might be Rejected and the Status Reason should be Canceled.

You can set up the Status for an SRD if there are no approvers defined for it, for example, Deployed (as indicated in the No Approver column).

- 5 To create a status flow, follow these steps:

NOTE
For more details on these approval process states, see “Approval states on the Status Flow tab” on page 113.

- a Define a status and a status reason (optional) for the Begin state.
This field specifies which status starts the approval process.
- b Define a status and a status reason (optional) for the Approved state.
If the SRD or service request is approved, the approval server changes the status and status reason values on the relevant form to the values you configure here.
- c Define a status and a status reason (optional) for the Rejected state.
If the SRD or service request is rejected, the approval server changes the status and status reason values on the relevant form to the values you configure here.
- d Define a status and a status reason (optional) for the No Approvers state.
If the approval server does not find any approvers, the approval server changes the status and status reason values on the relevant form to the values you configure here.

6 Click the Additional Qualifications tab.

You can include other fields in a service request to qualify which approval process to use for a particular request, for example, the Category 1 field or the Total Cost of the SRD.

7 Click Save.

Approval states on the Status Flow tab

The states (and lifecycle) of SRDs and service requests are completely dependent on the settings defined in Status and Status Reason fields on the APR:SYS-Approval Definition form. This means that when the Status and Status Reason fields for the SRD and service request records match the value specified in the Begin column, the approval process is started. Whenever there is a change in the Status and Status Reason for an SRD or service request, the workflow searches the APR:SYS-Approval Definition form to see if there are any approval mappings for the new Status and Status Reason combination. If a mapping is found, then the process name will be returned to the SRD or service request and the application command to the Approval Server to start the approval process is issued.

When the approval process starts, the Status and Status Reason fields are not modifiable to prevent further changes to the SRD or service request record until there is a decision (approved or rejected) from the approvers.

Approval configuration records are mapped for SRDs and service requests by navigational categories, price information, and so on.

An explanation of the approval states are provided, as follows:

- **Begin state**—This state is an indicator to the Approval Server for starting the approval process. For example, if you set up Pending as the Status and Approval as the Status Reason for an SRD, then the approval process will not start until the SRD records Status and Status Reason fields match the values you configured. The approval process, for example, will not start when the SRD is in a Status of Draft.
- **Approved state**—Based on the rules set up in the Approval Server, if one or all approvers have approved the SRD or service request, then the Approval Server changes the Status and Status Reason fields values on the SRD or service request record to match the values you configure here. At that time, the locked Status and Status Reason fields on those records will be unlocked and the records will go through the rest of their life cycle.

NOTE

The Approved state is based on the rules set up in the Approval Server (in the AP:Rule Definition form). To access the AP:Rule Definition form from the AP:Administration Console, click the Rule tab, select a rule, and then click the View button. For more information on rules in the Approval Server, see the *BMC Remedy Approval Server 7.1.00 Guide for Users and Administrators*.

Figure 4-18: AP:Rule Definition form

AP:Rule Definition (Modify)

AR SYSTEM - Approval Server

Rule Definition

Basic | Set Fields | Administrative Information

Definition

Rule Name* SRD Level - Approved Status* Active

For Process* Service Request Definition If Multiple Results

Process Instance Id AG00137260F2FD53VsRQ If Multiple Approvers

Rule Type* Approval Process Done Next Approver Rule Is

Order* 0 Assignee Group Permissions Public

Rule State

☒ Approved ☐ Rejected ☐ Cancelled ☐ Error

- **Rejected state**—This state defines the values of the Status and Status Reasons fields for SRDs and service requests if a record is rejected. For example, you might want to set the Status back to Pending and the Status Reason to More Information if the SRD or service request is rejected.
- **No Approvers state**—If the Approval Server doesn't find any of the mapped approvers, then the Status and Status Reason field values on the two forms will be changed to the values specified.

Creating people and mapping roles for approvals

When an SRD or service request is configured to require approval, you should review who the approvers are and, if appropriate, create additional approvers. The following rules apply:

- You can add Individuals or Support Groups as approvers.
- Group approval requests are sent only to group members with the SRD Approver or Request Approver roles.
- If an individual approver is needed, only people defined within the People form can be chosen as approvers.

► **To create individual and group approvers**

NOTE

For more information, see “Creating individual mappings to work with level-type approval processes” on page 118 and “Creating group mappings to work with level-type approval processes” on page 121. Also see Chapter 7 in the *BMC Remedy IT Service Management 7.0 Configuration Guide*.

- 1 From the Application Administration Console, click the Custom Configuration tab.
You can also click the Create People button in the Standard Configuration tab.
- 2 From the Application Settings list, choose Foundation > People > People, then click Open.
- 3 In the People form, enter the person’s required information.
- 4 Define the person as a member of the Support Staff *to include him or her as a group approver*.
- 5 In the Login/Access Details tab, give the person the required Service Request Management permissions, for example, Service Request User.

NOTE

The *minimum* permissions in Service Request Management to approve service requests is Service Request User. Users with these permissions can view service requests in the Request Entry Console, but they must use Approval Central to approve them.

- 6 In the Support Groups tab, give the person the SRD Approver or Request Approver support roles *to include him or her as a group approver*.
- 7 Add any other permissions as necessary.
- 8 Save your changes.

Approver mappings

This section describes how you can configure approver mappings to work with SRM.

IMPORTANT

No approver mappings are provided by default with SRM. You must create approver mappings if you want to use the “Level” approval processes for SRDs or Service Requests. Out-of-the-box, the default SRD approver is the Request Catalog Manager, and the default Service Request approver is the requester’s manager, which is based on the requester’s manager information defined in the ITSM Foundation People form.

You can use the Approver Mappings form to set up individuals and support groups as approvers for each approval phase of SRDs or service requests, based on the approval process defined in the Approval Process Configuration form.

You can choose the Service Request Definition - Level approval phase. Level-type approval process configuration records only function *after* you have created approver mappings. You can only create approver mappings to work with the approval phases that are configured to work with SRM.

You set up approvers for each phase of SRDs and service requests by navigational category, price, and so on.

NOTE
Chain and Ad Hoc rules in the approval server do not look for approval mapping records. Even if the approval mapping records exist, they have no effect on these rules. *Only* Level rules use the information in the Approval Mappings form. For level-type approval processes, approvers must be mapped.

Figure 4-19: Approver Mappings form

The screenshot shows the 'Approval Mappings (Search)' form. It has a search bar at the top right with a magnifying glass icon and the text 'Search' and 'Advanced'. The form is divided into two main sections. The left section contains fields for 'Approval For*' (a dropdown menu with 'Individual' selected), 'First Name' (text box with 'John'), 'Last Name+' (text box with 'Admin'), 'Approver ID' (text box), 'Assignment Availability' (dropdown menu), 'Submitter*' (text box with 'Demo'), and 'Status*' (dropdown menu with 'Proposed'). The right section contains fields for 'Approval Indicator*' (dropdown menu with 'Service Request Definition'), 'Phase Company*' (dropdown menu with '- Global -'), 'Phase Name*' (dropdown menu with 'Service Request Definition - Level' selected), 'Level*' (dropdown menu with 'SYSTEM PHASE'), and 'Description' (text box). A dropdown menu is open for 'Phase Name*', showing 'Service Request Definition - Level' and '- Global -'.

Mapping approvers to approval phases for level-type approval processes

This section describes how to map approvers to approval phases for level approval processes.

► To map approvers to approval phases

- 1 From the Application Administration Console, choose Service Request Management > Approval > Approval Mappings, and then click Open.

The Approver Mappings form appears in New mode. The bottom half of the form is empty until you select an item in the Approval Indicator field.

2 Enter information in the following fields:

Field Name	Action and description
Approval For	<p>Select the type of approver.</p> <p>The options are:</p> <ul style="list-style-type: none"> ■ Individual—If you select this option, enter the individual's last name and press the Enter key. The Approver ID (or login name) is automatically populated. For more information, see “Creating individual mappings to work with level-type approval processes” on page 118. ■ Group—If you select this option, the First Name, Last Name, and Approver ID fields are replaced by Support Company, Support Organization, and Support Group Name. <p>Select values for each field. The choices available in the Support Organization menu list are dependent upon the option you select for Support Company, and the choices available in the Support Group menu list are dependent upon the option you select for Support Organization. For more information, see “Creating group mappings to work with level-type approval processes” on page 121.</p> <p>Note: If you select the Group option, all the people who belong to the support group <i>and</i> have the SRD Approver or Request Approver functional role are set up as approvers. By default, only one approver in the group must sign off on the approval before it can move to the next state, as described in “Creating group mappings to work with level-type approval processes” on page 121. For information on modifying the If Multiple Approvers setting in the AP:Administration form, see the <i>BMC Remedy Approval Server 7.1.00 Guide for Users and Administrators</i> in the section on roles.</p>
First Name	If you select Approval For Individual, this field appears. Enter the first name of approver.
Last Name	If you select Approval For Individual, this field appears. Use auto-fill to enter the approver's last name.
Approver ID	If you select Approval For Individual, this read-only field appears. The Login ID of the approver automatically is included when you select the approver.
Assignment Availability	Select Yes or No to indicate if the individual or group is available for the assignment.
Submitter	This field is auto-populated with the login name of the person who is creating this approver mapping.
Status	<p>Indicates the current status of the group or individual approving the the service request or SRD. You can select the following options:</p> <ul style="list-style-type: none"> ■ Proposed ■ Enabled ■ Offline ■ Obsolete ■ Archive ■ Delete <p>For the approver mapping to be available, select a status of Enabled.</p>

Field Name	Action and description
Approval Indicator	Select which form this approver mapping will affect. For SRM, create approver mappings for Service Request and Service Request Definition. When you select either of the two options, category fields and a Cost field appear on the Additional Mappings tab. This allows you to map the approver to a category-cost combination.
Phase Company	Phase company for this approver mapping. This option maps the approval phase to the approver.
Phase Name	When you select a phase name, the Phase Company field is automatically populated. Note: These phase name values are populated from the <i>enabled</i> approval process configuration records in the Approval Process Configuration form.
Level	Specify the level of approval for the individual or group.
Description	Enter a description for this approver mapping.

- 3 Click the Mapping Criteria tab to add additional criteria for navigation tiers, SRD information, and so on.

The Individual or Group approver defined will be used only for service requests and SRDs matching this criteria.

- 4 Click Save.

Saving the approver mapping record provides the data on the join between the AP:Approver Lookup form and the SRM:ServiceRequestDefinition form for SRDs, or the AP:Approver Lookup form and the SRM:Request form for service requests. The Approval Server uses the join form to select approvers for a specified process.

NOTE

This mapping is specifically for the Service Request and SRD Level process. The Service Request and SRD Ad Hoc process does not use the Approver Lookup record, nor does the Service Request Management Chain process.

Creating individual mappings to work with level-type approval processes

This section provides a step-by-step example of how to configure individual approver mappings to work with SRM.

► To create individual mappings to work with level-type approval processes

- 1 From the Application Administration Console, choose Foundation >Advanced Options > Approval Process Configuration, and then click Open.
- 2 In the Approval Process Configuration form, search for the SRD:ServiceRequestDefinition form name.

The two SRD approval process configuration records appear.

- 3 Disable the Service Request Definition - Ad Hoc approval configuration record.
This configuration record is enabled by default.
- 4 Enable the Service Request Definition - Level approval configuration record.
You now can select the Service Request Definition - Level phase when you create an approver mapping.
- 5 From the Application Administration Console, choose Service Request Management >Approval > Approval Mappings, and then click Open.
- 6 In the Approval For field, select Individual.

NOTE

To map an individual approver, you can select *any* individual who has a record in the People form. It is *not* necessary to select a person with the SRD Approver functional role, for example, John SRM. In this example, use Alice Approver.

- 7 In the Approval Indicator field, select which form this approver mapping will affect, for example, Service Request Definition.
- 8 In the Phase Name field, select which approval phase needs mapping in the application, for example, Service Request Definition - Level.

NOTE

When you select a phase name, the Phase Company field is automatically populated.

- 9 Enter all the required information.
- 10 Depending on which mapping values you specify, different approvals are generated.

When approver mappings are created, you do not need to enter values into all the fields on the Approver Mappings form.

IMPORTANT

Fields scattered throughout the Approver Mappings form have dots in them. These are wildcards, designed to return all records in a join-form query. You can replace them with specific search terms, for example, to create an approval for a specific navigational category.

For example, the individual approval is generated on the basis of the approver mapping values at the top of the form and any optional values at the bottom of the form, for example, if you enter a navigational category. Alice is the approver for all Service Request Definition - Level processes, since none of the additional mapping values were defined.

You could create multiple approver mappings. For example, you could configure a different approver to approve SRDs that are “gold” level and cost over \$500.00.

11 Save the approver mapping.

Figure 4-20: Approver Mappings—Individual

These dots in the fields are wildcard placeholders, which return *all* records in a query.

Approval Mappings APL000000000001 (Modify)

Approver Mappings

Approval For*

Individual

First Name

Alice

Last Name+

Approval

Approver ID

alice_approver

Assignment Availability

Yes

Submitter*

Demo

Status*

Offline

Approval Indicator*

Service Request Definition

Phase Company*

Global

Phase Name*

Service Request Definition - Level

Level*

0

Description

Additional Mappings

Mapping Criteria

Navigation Categories

Category 1

Category 2

Category 3

Request Catalog Manager

Company

Request Manager

SRD Information

SRD Level

Price (lower limit)

0.00 USD

Price (upper limit)

0.00 USD

Business Service

Customer Information

Customer First Name+

Customer Middle Name

Customer Last Name+

Save

Close

12 Create an SRD, and then promote it to the Request for Approval status.

If you have not created any other approver mappings, whenever an SRD is promoted to the Request for Approval state, the SRD cannot be deployed *until* this individual approves the request.

Figure 4-21: Individual required to approve SRD

Definition | Service Request | Entitlements | Work Info | Approvals | SLM

Required Approvers

☒ Set using Approval Engine

☐ Individuals

☐ Customer

☐ Catalog Manager

☐ Service Request Coordinator

Approvers

Approval Status

Approvers

Approval Status

Pending

Approvers

alice_approver

Approval Status

Approvers

Approval Status

Pending

Approvers

alice_approver

Add

Refresh

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In addition, you could create a multiple-level approver mapping—where both John SRM and Alice Approver must approve the SRD before it can move to the next state. Here you could set John as 0 level and Alice as 1. In this example, John must approve the SRD first, then the approval server generates a second approval for Alice.

Creating group mappings to work with level-type approval processes

This section continues the mappings example by showing how to configure group approver mappings to work with SRM. To create group approvers for SRDs, users must be members of the same support group (for example, IT Hardware), and they must have the SRD Approver functional role. When the SRD requires group approval, *one* of them must approve the request before it can move to the next stage.

— **IMPORTANT** —

When an approver list includes functional roles (for example, the SRD Approval functional role), specific settings in the AP:Role form in the Approval Server determine whether the role is expanded into individual signature-line records for each member of the role, or a single signature-line record is created for the entire role.

In the Approval Server integration with SRM, the SRD Approval functional role maps to the SRD Approver role name in the AP:Role form. (To access the AP:Role form from the AP:Administration Console, click the Role tab, select a role, and then click the View button.) In the SRD Approver role, group approvals by default require that only *one* member of the support group must sign the approval to move the SRD to the next stage. For more information on how the All Must Sign and If Multiple Approver settings are used in the Approval Server, especially if you require all members of a group to approve the request, see the *BMC Remedy Approval Server 7.1.00 Guide for Users and Administrators*.

Figure 4-22: AP:Administration Console—Role tab

Process	Rule	Notification	Role	Form	Administrator	Alternate
Role Name						
SGP000000000005	SRD Approver	One Must Sign	If Multiple Approvers	Member List	Status	
SGP000000000005	Support Group Lea	One Must Sign		lk_admin_winspan3;	Active	
SGP000000000005	Work Order Assign	One Must Sign		lk_admin_winspan3;	Active	
SGP000000000005	Work Order Manag	One Must Sign		lk_admin_winspan3;lk_mgr_winspa	Active	
SGP000000000014	CAB-Assignee	One Must Sign		MarkW;	Active	
SGP000000000014	CAB-Member	One Must Sign		MarkW;	Active	
SGP000000000014	Incident Manager	One Must Sign		MarkW;	Active	
SGP000000000014	Request Approver	One Must Sign		MarkW;	Active	
SGP000000000014	SRD Approver	One Must Sign		MarkW;	Active	
SGP000000000014	Support Group Lea	One Must Sign		MarkW;	Active	
SGP000000000014	Work Order Assign	One Must Sign		MarkW;	Active	
SGP000000000014	Work Order Manag	One Must Sign		MarkW;	Active	
SGP000000000015	Request Approver	One Must Sign		alice_approver;	Active	
SGP000000000015	SRD Approver	One Must Sign		alice_approver;	Active	
SGP000000000015	Work Order Assign	One Must Sign		john_admin;john_srm;	Active	
SGP000000000015	Work Order Manag	One Must Sign		john_admin;john_srm;	Active	

View Search Create Delete Refresh

► **To create group mappings to work with level-type approval processes**

- 1 Make sure the Service Request Definition - Ad Hoc approval configuration record is disabled and the Service Request Definition - Level approval configuration record is enabled.

For information, see “Creating individual mappings to work with level-type approval processes” on page 118.

- 2 From the Application Administration Console, choose Service Request Management >Approval > Approval Mappings, and then click Open.
- 3 In the Approval Mappings form, search for any individual mappings, and then disable them.

For the purposes of this example, do not combine individual and group approver mappings.
- 4 Create a new approver mapping.
- 5 In the Approval For field, select Group.
- 6 When you select a Support Company, Support Organization, and Support Group, select a support group that includes people with the SRD Approver functional role.

For example, the IT Hardware support group should include both John SRM and Alice Approver.

- 7 In the Approval Indicator field, select which form this approver mapping will affect, for example, Service Request Definition.
- 8 In the Phase Name field, select which approval phase needs mapping in the application, for example, Service Request Definition - Level.

NOTE

When you select a phase name, the Phase Company field is automatically populated.

- 9 Enter all the required information.
- 10 Depending on which mapping values you specify, different approvals are generated.

When approver mappings are created, you do not need to enter values into all the fields on the Approver Mappings form.
- 11 Save the approver mapping.

Figure 4-23: Approver Mappings—Group

- 12 Create an SRD, and then promote it to the Request for Approval status.

Whenever an SRD is moved to the Request for Approval state, the SRD cannot be deployed *until* this support group approves the request.

Figure 4-24: Support group required to approve SRD

Approval Status	Approvers	Approver Signature	Alternate Signature
Pending	john.srm.mandy.manager.alice.approver		

If you wanted to create a multiple-level group approver mapping, you could create another group approver mapping for another support group, and then set the Level setting to one (1). In this case, both support groups must approve the SRD before it can move to the next state. After the first support group approves the SRD (level 0), the second level of approvers (level 1) must approve the SRD before it can be moved to the next stage.

Adding approvers to SRDs

A Service Catalog Manager can add additional approvers to the SRD. The following rules apply:

- Support Groups or Individuals can be added as approvers.
- Group approval requests are sent only to group members with the SRD Approver role.
- If an individual approver is needed, only people defined within the People form can be chosen as approvers.

NOTE

The ability to add someone as an approver is restricted, based on the permissions of the user adding an approver. If the users who are adding signatures cannot see a person based on row-level access, they cannot add that person as an approver. But anyone with a record in the People form can become an approver *if* the assigner has access to that information.

► To add approvers to SRDs

- 1 Open the SRD.
 - 2 Click the Approvals tab.
 - 3 Click Add.
- The Add Approver dialog box appears.

Figure 4-25: Add Approver dialog box

- 4 Select an individual or a group to add.
 - 5 Enter the name of the individual or group.
- You can add more than one individual approver or group.

- 6 (Optional) To search for an individual, enter a name or initial in the Full Name+ field and press Return.

The People Search form appears.

- 7 Click Save and close the dialog box.

You might have to refresh the table field to display all approvers.

- 8 Save your changes.

The approver is notified that they must review the SRD.

Adding alternate approvers

From the Alternate Approvers tab of the People form, you can set up one or more people to approve SRDs that are pending your approval, for example, to add another Service Catalog Manager as an alternate approver while you are on vacation.

NOTE

You can only configure alternate approvers for yourself.

► To add alternate approvers for people

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > People > People, then click Open.

The People form appears.

- 3 Search for yourself.
- 4 Select your record, then click the Alternate Approvers tab.
- 5 Click Update Alternate Approvers.

The Alternate Approvers form appears.

- 6 To locate the alternate approver, click Search.
- 7 In the People Search form, select the alternate approver, then click Select.
- 8 Select the start date and the end date.
- 9 In the Notify Alternate field, select whether to notify the alternate approver.
- 10 In the Covering field, select whether this will be an alternate for all approvals or only for a specific process.
- 11 If you selected Specific Process in the Covering field, select the applicable process in the Process field.
- 12 Click Add.

5 SRM assignment configuration

SRM Assignment is based on organization, location, service, and product categorization. Assignments are also associated with the application in which they are used. An assignment can be broadly or narrowly defined, and can apply to different systems.

The following topics are provided:

- Working with SRM auto-assignment configuration (page 128)
- Creating assignment routing for SRM (page 128)
- Creating group assignment for SRM (page 130)
- Automatic assignment to individuals (page 133)

Working with SRM auto-assignment configuration

Using the Group Assignment form, you can automatically assign an issue or request to a group. Using the Assignment Engine, you can define criteria to automatically assign an issue to a specific individual from the available people.

To remove a person from individual auto-assignment, see the *BMC Remedy IT Service Management 7.0 Configuration Guide*.

Creating assignment routing for SRM

You can configure assignment routing so that the system automatically assigns records, such as investigations or change requests, to the appropriate support group. When an application uses the routing order, which is a feature of many of the main ticketing forms, it uses information from the form that it is on to find an assignment entry, and select the support group for assignment.

For SRM to route the correct assignments when you create a service request, you must configure the Service Request Assignee, Work Order Manager, and Work Order Assignee. If SRM is integrated with Incident Management or Change Management, make sure that you configure assignment routing for the Incident Owner or the Infrastructure Change Manager as well.

► **To create assignment routing for SRM**

- 1 On the Standard Configuration tab of the Application Administration Console, make sure that the correct company is selected.
- 2 Click the Create link next to Assignment.

The Assignment dialog box appears.

Figure 5-1: Assignment dialog box

- 3 In the Event field, select the type of assignment entry.
For SRM, the following assignment entries are applicable:
 - Service Request Assignee (required)
 - Work Order Manager (required)
 - Work Order Assignee (required)
 - Task Assignee (required)
 - Infrastructure Change Manager (required if SRM is integrated with Change Management)
 - Infrastructure Change Assignee (required if SRM is integrated with Change Management)
 - Incident Owner (required if SRM is integrated with Incident Management)
- 4 Select the support group to assign.

- 5 In the Routing Order area, specify when this assignment entry should be used for the automated assignment.
 - **Company**—Select the location of the incident or request. If this routing applies to all companies, select Global.
 - **Operational Categorization**—You can route assignments by operational services.
 - **Product Categorization**—You can route assignments by product categorization.
- 6 Click Add.

You can continue to add assignment routings.
- 7 When you are finished adding assignment routings, click Close.

Creating group assignment for SRM

The first step in creating assignment information is configuring a group assignment. You can then use predefined assignment information for automatic assignment to an individual in the assigned group using the Assignment Engine, if needed. Advanced administrators can also define custom individual assignment information for the Assignment Engine.

Even if you have already creating assignment routing for other ITSM applications, you *must* configure the Service Request Assignee, Work Order Manager, and Work Order Assignee.

NOTE

If assignments are not configured, they must be manually entered.

From the Configure Assignment form, you can also modify or delete assignment information.

► Creating a group assignment

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Configure Assignment > Configure Assignment, then click Open.

The Configure Assignment form appears.

- 3 To change the form to New mode, click the New Request toolbar icon in BMC Remedy User or the New Request button on the form in a browser.

Figure 5-2: Configure Assignment form

Assignment Configuration ASG000000000012 (Modify)

BMC REMEDY IT SERVICE MANAGEMENT

Configure Assignment

Group Assignment

Event Details

Event* Work Order Manager

Description

Status* Enabled **Sort Order**

Assignment

Support Company*+ Acme Inc.

Support Organization* IT Software

Assigned Group* IT Software

Support Group ID* SGP000000000004

Routing Order

Order 1 - Organization

Contact Company*+ Acme Inc.

Organization

Department

Order 2 - Location

Company*+ Acme Inc.

Region

Site Group

Site+

Order 3 - Operational Categorization

Tier 1

Tier 2

Tier 3

Order 4 - Product Categorization

Tier 1

Tier 2

Tier 3

Name

Available Systems

Systems Supported ☒ **Clear**

Incident Management ☐ Yes

User Service Restoration ☐ Yes

User Service Request ☐ Yes

Infrastructure Restoration ☐ Yes

Infrastructure Event ☐ Yes

Problem Management ☐ Yes

Configuration/Asset Management ☐ Yes

Change Management ☐ Yes

Purchase Requisition ☐ Yes

Work Order Management ☒ Yes

Save **Close**

- 4 In the Event field, select the type of assignment entry, for example, Work Order Manager.

For more information, see “Assignment events” on page 133.

- 5 In the Assignment area, select the support company, support organization, and assigned group to use for assignment.
- 6 In the Available Systems area, select the applications and modules to apply to the assignment entry.

For Work Orders, make sure you select Work Order Management.

For example, you can create an assignment entry that applies only to Incident Management. This enables you to select different support groups for assignment, even if the mapping selections are the same.

- 7 In the Routing Order area, as an advanced feature you can further specify when this assignment entry should be used for the automated assignment. The Contact Company and Company fields are required.

The Assignment entry can be mapped using the following data structures:

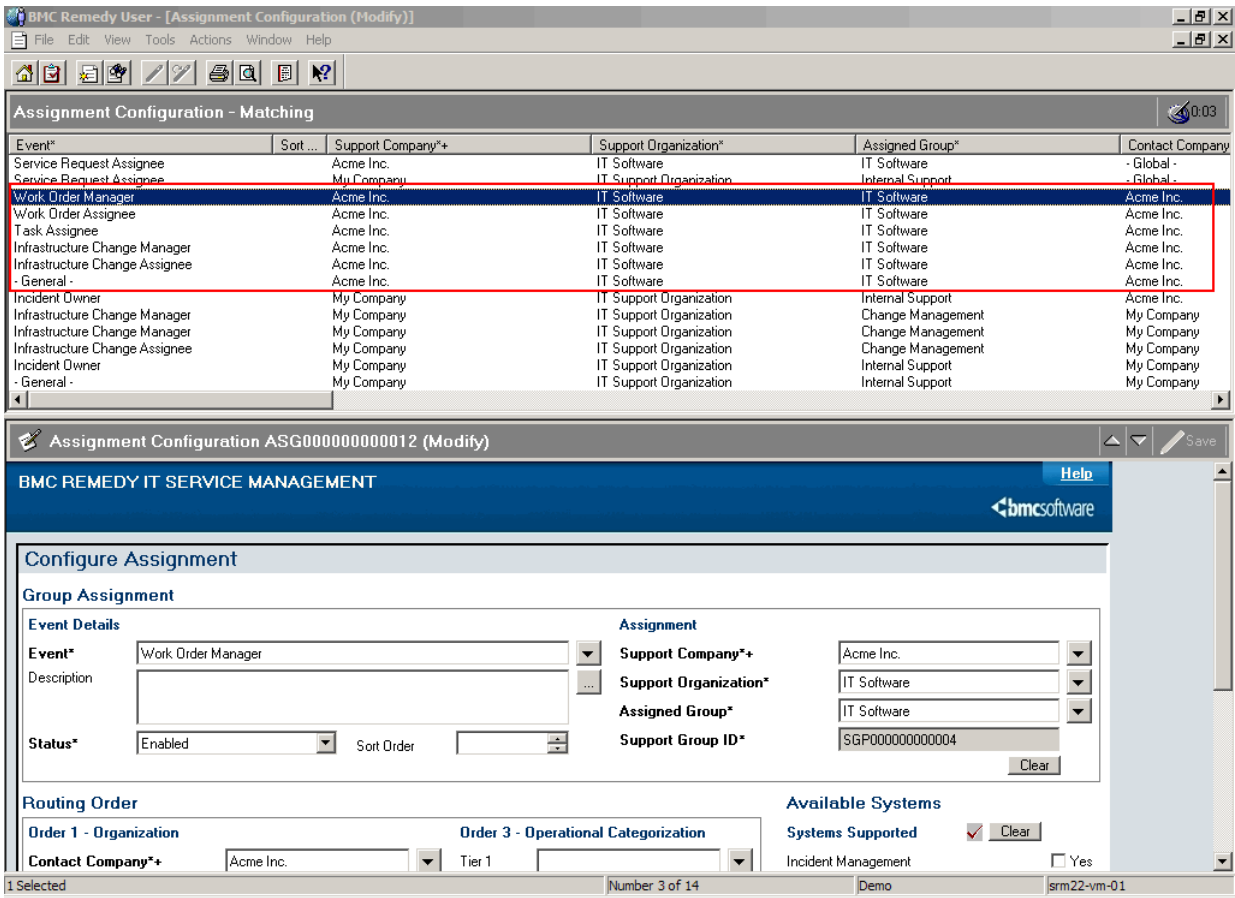
- Organization
- Location
- Operational Categorization
- Product Categorization

When SRM uses the routing order, which is a feature of many of the main ticketing forms, it uses information from the form that it is on to find an assignment entry, and in turn, the support group for assignment.

- 8 Click Save.
- 9 Create the group assignment for Work Order Assignee.
- 10 Create the group assignments for your company.

By default, assignment configuration records were installed out-of-the-box for your use as templates. You can copy these records for your own company, for example, to create Service Request Assignee, Incident Owner, or Infrastructure Change Manager assignments. The following figure shows a list of new assignment records, configured for a new company.

Figure 5-3: Assignment records



Assignment events

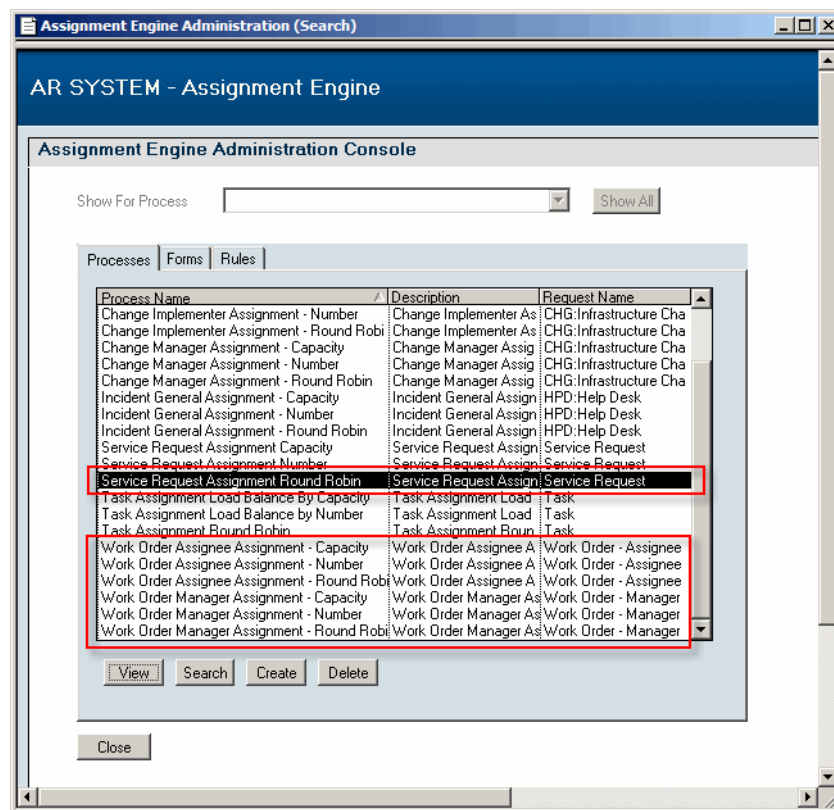
The following table describes the assignment events.

Event	Available systems	Form assignment	Description
Service Request Assignee	All	Service Request	Used to assign a request to the request coordinator group.
Task Assignee	Task Management System	Task	Used to assign a task to the task implementer group.
Work Order Assignee	Work Order Management	Work Order	Used to assign a work order to the work order management group.
Work Order Manager	Work Order Management	Work Order	Used to assign a work order to the work order management group.

Automatic assignment to individuals

After you have configured SRM group assignments, the round robin method of assigning service requests and work orders to individuals is activated. By default, SRM uses the round robin method in the Assignment Engine to assign service requests and work orders to the person who has gone the longest since receiving an assignment.

Figure 5-4: Assignment Engine Administration Console



In addition, you can configure work orders to use different assignment processes for work order managers and assignees, for example, load balance by capacity. For more information, see “Configuring work order rules” on page 85.

Advanced administrators can also define custom individual assignment information for work orders with the Assignment Engine. For more information about configuring the Assignment Engine for assignment to individuals, see the *BMC Remedy Action Request System 7.1.00 Configuring* guide.

6 Configuring entitlements

This section includes additional configuration procedures for the SRM Administrator. This section provides procedures for configuring entitlement.

NOTE

Users with Entitlement Administrator and SRM Administrator permissions can configure entitlements in SRM. Entitlement configuration tasks are performed from the Application Administration Console.

The following topics are provided:

- Configuring entitlement (page 136)
- Enabling entitlement (page 137)
- Creating entitlement groups (optional) (page 138)
- Creating entitlement rules (page 139)
- Validating users (optional) (page 142)
- Creating On-Behalf-Of definition rules (page 144)

Configuring entitlement

Entitlement enables you define which users can access service request definitions (SRDs). Entitlements are defined using the Entitlement Console. Defined entitlements must be added on the Entitlements tab of the Service Request Definition form.

— **IMPORTANT** —

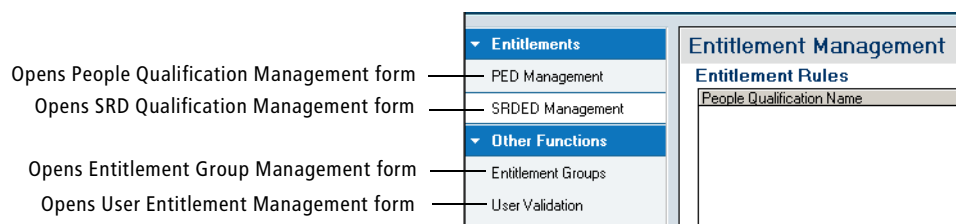
Enterprise customers, or companies using multi-tenancy, should find entitlements helpful in their organizations, so that users can view *only* the available services to which they are entitled. But smaller or medium-sized companies might not need to add this extra level of access control provided by SRM entitlement.

Following is an overview of the entitlement configuration process:

Stage	Action	See the section
Stage 1	Enable entitlement.	“Enabling entitlement” on page 137
Stage 2	Create entitlement groups (optional).	“Creating entitlement groups (optional)” on page 138.
Stage 3	Create people entitlement rules.	“Adding people entitlement definitions” on page 139.
Stage 4	Add service request definition qualifications for entitlement.	“Adding service request definition qualifications” on page 141.
Stage 5	Validate users (optional).	“Validating users (optional)” on page 142.
Stage 6	Add entitlement rules to your SRDs.	<i>BMC Service Request Management 2.2.00 Administrator’s Guide</i>
Stage 7	Add on behalf of qualification rules for users (optional).	“Creating On-Behalf-Of definition rules” on page 144.

You can access entitlement configuration forms through the Application Administration Console, or through links in the navigation pane of the Entitlement Console. To open the Entitlement Console, choose Service Request Management > Entitlement > Entitlement Management from the Application Administration Console. You can then open entitlement forms using links on the navigation pane.

Figure 6-1: Entitlement Console—navigation pane



Enabling entitlement

IMPORTANT

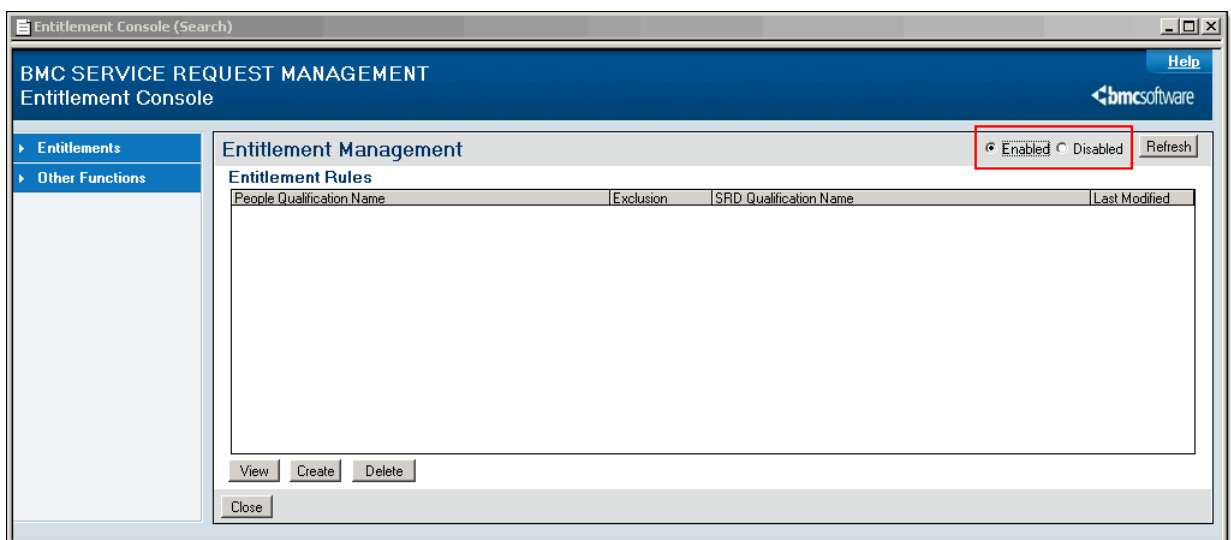
Before you enable entitlement, make sure you create rules for all users to access their SRDs. Otherwise, after you enable entitlement, users will not be able to access their SRDs. While you are creating entitlement rules, you might want to first create a temporary entitlement rule specifying -Everyone- in the People Qualification Name field so everyone can access their SRDs until you complete creating entitlement rules for all users. -Everyone- is predefined and cannot be changed.

► To enable entitlement

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Entitlement > Entitlement Management, and then click Open.

The Entitlement Console appears.

Figure 6-2: Enabling entitlement



- 3 To enable entitlement, select the Enabled option.
You now can create entitlement groups and rules.

Creating entitlement groups (optional)

Entitlement groups enable you to define standard entitlement definitions that you can associate with specified groups of users.

TIP

As an alternative to setting up entitlement groups, you can create people entitlement definitions by company, login ID, or location (region, site group, and site).

► To add an entitlement group

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Entitlement > Entitlement Group Management, and then click Open.

The Entitlement Group Management form appears.

Figure 6-3: Entitlement Group Management form

- 3 Click the Create button.
- 4 The Entitlement Group form appears.
- 5 Select a company and enter an entitlement group name and description.
- 6 Click Save.

The entitlement group is added.
- 7 To add a user to the group, select the entitlement group you just added, and then click the Add button under the Entitlement Group Users table.

The People Search form appears.
- 8 Select a person to add to the group, and then click Select.

The person you selected appears in the table.
- 9 When you complete adding entitlement groups and users, click the Close button.

Creating entitlement rules

Entitlement rules associate people qualifications with service request definition qualifications.

NOTE

To increase performance, entitlement rules are cached. Although the entitlement cache is flushed when an entitlement rule is created or modified, users must reopen the Request Entry console to see any changes.

Adding people entitlement definitions

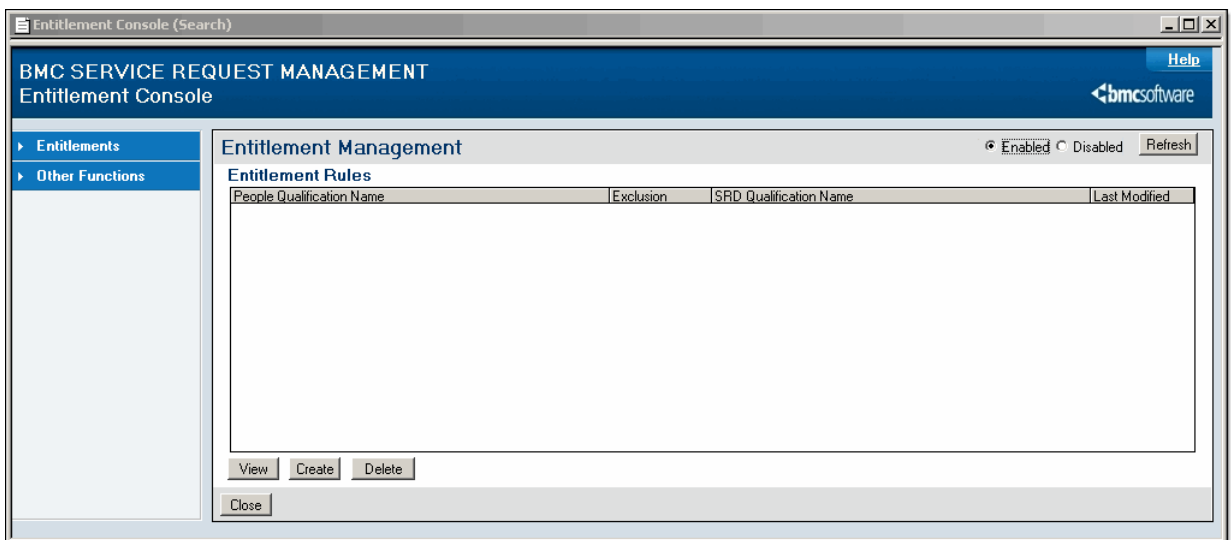
People qualification management enables you to group people together by creating people entitlement definition that you can associate with specified entitlement SRD rules.

► To add people entitlement definitions

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Entitlement > Entitlement Management, and then click Open.

The Entitlement Console appears.

Figure 6-4: Entitlement Console



- 3 Click the Create button under the table.
The Entitlement Rule form appears.

Figure 6-5: Entitlement Rule form

- 4 Exclude users from access by selecting the Exclusion Rule option.

Figure 6-6: Entitlement Rule form—Exclude Rule option

- 5 Click the Create button under the People Qualification Name field.
The People Qualification for Entitlement form appears.

Figure 6-7: SRD Qualification for Entitlement form

NOTE

You can also open this form from the Entitlement Console by choosing Entitlements > PED Management. In the People Qualification Management form, click Create.

- 6 If necessary, select the status. The default setting is Enabled.
- 7 Enter a name for the people qualification, such as:
 - Company—Company name
 - AR Username—Login ID
 - Entitlement Group—Entitlement group description
 - Location—Region, site group, site
 - Advanced Qualification—Description of the qualification
- 8 Select the Company, AR Username, Entitlement Group, Location, or Advanced Qualification option, and then select or enter a value.
- 9 Click Save.

Adding service request definition qualifications

SRD qualification management enables you to group SRDs together by creating SRD entitlement definitions that you can associate with specified entitlement people rules.

► To add a service request definition qualification for entitlement

- 1 On the Entitlement Rule form, select a People Qualification Name you added previously.
- 2 Click the Create button under the SRD Qualification Name field.

The SRD Qualification for Entitlement form appears.

Figure 6-8: SRD Qualification for Entitlement form

NOTE

You can also open this form from the Entitlement Console by choosing Entitlements > SRDED Management. In the SRD Qualification Management form, click Create.

- 3 If necessary, select the status. The default setting is Enabled.
- 4 Enter a name for the SRD qualification, such as:
 - Category of SRD—Category 1, category 2, category 3
 - SRD Level—Level
 - Specific SRD—SRD ID number, description
 - Advanced Qualification—Description of qualification
- 5 For the option you selected, do one of the following:
 - Select one of more categories.
 - Select a specific SRD.
 - Enter or select an SRD level.
 - Enter an advanced qualification.
- 6 Click Save.

You can also exclude users from access by selecting the Exclusion Rule option.

Figure 6-9: Entitlement Rule form—Exclude Rule option

The screenshot shows the 'Entitlement Rule' form in the BMC Software interface. The 'Exclusion Rule' checkbox is checked. The 'People Qualification Name' dropdown is set to 'Software'. Below it, the text '...Are Not Entitled To See...' is visible. The 'SRD Qualification Name' dropdown is set to 'Category - Hardware'. The form includes 'View' and 'Create' buttons for both qualification types, and 'Save' and 'Close' buttons at the bottom. Annotations with arrows point to the 'Exclusion Rule' checkbox and the '...Are Not Entitled To See...' text.

Validating users (optional)

After creating entitlement rules and qualifications, you can validate user access to SRDs. You can also use user validation to troubleshoot entitlement problems.

► To validate users

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Entitlement > Entitlement Management, and then click Open.

The Entitlement Console appears.

- 3 On the left navigation pane, choose Other Functions > User Validation.
The User Entitlement Validation form appears.

Figure 6-10: User Entitlement Validation form

User Entitlement Validation Refresh

User Name: Select [Qualification Details...](#)

Matching Entitlement Groups

Company	Entitlement Group ID	Permission Group2	Description

View

Matching Entitlement Rules

PED Name	Exclusion Rule	SRDED Name	EntitlementQualification

View

Matching SRDs

SRD Number	SRD Status	Category1	Category2	Category3	SRD Level

View

Close Flush Entitlement CACHE

- 4 Click the Select button.
The People Search form appears.
- 5 Select the user to validate, and then click Select.

The matching entitlement groups, entitlement rules, and SRDS for the user appear in the tables. Click the View button under a table to view more details.

To see the qualification for matching entitlement rules and SRDs, click the Qualification Details link.

Figure 6-11: User Entitlement Validation form—Qualification Details link

User Entitlement Validation

User Name: Select [Qualification Details...](#) Qualification Details link

Matching Entitlement Groups

Company	Entitlement Group ID	Permission Group2
My Company	2000000023	ABC

View

The Entitlement Management Qualifications form appears.

Figure 6-12: Entitlement Management Qualifications form

6 To see the information more clearly formatted, click the Help Text link.

NOTE

Although the entitlement cache is flushed when an entitlement rule is created or modified, you can click the Flush Entitlement CACHE button to force a flush of the cache. After the cache is cleared, users must reopen the Request Entry console to see any changes.

Creating On-Behalf-Of definition rules

The SRM Administrator can create *on behalf of* definition rules to enable a user to use create and manage service requests for other users.

NOTE

Users who are allowed to submit requests on behalf of another user must be assigned a fixed or floating license. If they are not, they cannot manage requests after they have been submitted on behalf of another user. In addition, they cannot manage a cart for another user.

TIP

You can use this feature even if you choose to disable entitlement management.

► **To create on-behalf-of definition rules**

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Entitlement > On Behalf Of Management, and then click Open.

The On Behalf Of Definition Rules form appears.

Figure 6-13: On Behalf Of Definition Rules form

The screenshot shows the 'On Behalf Of Definition Rules' form. At the top, there's a header with the BMC Software logo and a 'Help' button. Below the header, the form title 'On Behalf Of Definition Rules' is displayed. Underneath the title, there is a 'User Name' field containing the text 'fbblack' and a 'Select' button. Below this is a section titled 'Manage the User's to act "On Behalf Of"' which contains a table with columns: Rule Type, User Access, Login ID, Last Name, First Name, Company, Organization, Department, and Full Name. The table is currently empty. At the bottom of the form, there are three buttons: 'Create', 'Delete', and 'Close'.

- 3 Click the Select button.
The People Search form appears.
- 4 Search for a user to act on behalf of other users, select the user, and then click Select.
- 5 Click the Create button under the table.
The People Search form appears.
- 6 Search for a users to be acted for by the user selected in step 4, select the user, and then click Select.
- 7 When you finish, click Close.

Advanced SRM Configuration tasks

After you have performed the quick-start configuration steps and the basic configuration steps, the SRM Administrator can perform the additional advanced configuration procedures presented in this section.

NOTE

Only users with SRM Administrator permissions can configure SRM.

The following topics are provided:

- Advanced configuration overview (page 148)
- Registering advanced interface forms (page 149)

Advanced configuration overview

— **IMPORTANT** —

This section assumes that you have already performed the quick start and basic configuration steps.

The Standard Configuration tab in the Application Administration Console enables you to configure standard information for your organization, such as People, Company, Location, and Site information, if you have not previously configured this information in BMC Remedy IT Service Management 7.0. For more information, see “Performing a standard configuration” on page 179.

The following table lists advanced configuration tasks that you can perform for BMC Service Request Management. You perform these tasks from the Custom Configuration tab of the Application Administration Console.

Action	Menu item	See the section
Stage 12—Localizing AOTs and navigational categories		
Localize navigational categories.	Service Request Management > Navigational Categories > Navigation Categories	See the relevant section in the <i>BMC Service Request Management 2.2.00 Administrator's Guide</i> .
Localize browse for service details.	Service Request Management > Request Entry Management > Browse for Service Details	See the relevant section in the <i>BMC Service Request Management 2.2.00 Administrator's Guide</i> .
Localize AOTs.	Service Request Management > Application Configuration > Define Application Object Template	See the relevant section in the <i>BMC Service Request Management 2.2.00 Administrator's Guide</i> .
Stage 13—Working with advanced interface forms		
Register advanced interface forms.	Service Request Management > Advanced > Configure Advanced Interface data	“Registering advanced interface forms” on page 149.
Configure type fields in the Work Order Template form.	Service Request Management > Work Order > Work Order Template	“Configuring type fields in the Work Order Template form” on page 151.
Stage 14—Configure SRM to work with third-party applications		
Register the back-end applications that will be using SRM.	Foundation > Advanced Options > Command Automation Interface - Application Registry	“Registering applications” on page 154.
Configure the event commands for SRM to communicate with the back-end applications.	Foundation > Advanced Options > Command Automation Interface - Define Command Parameters	“Configuring event commands” on page 157.
Register the fields for the application.	Service Request Management > Application Configuration > Define Application Field	“Registering the form fields for the application” on page 167.

Action	Menu item	See the section
Define the target data.	Service Request Management > Application Configuration > Define Application Target Data	“Defining target data from third-party applications” on page 169.

Registering advanced interface forms

Three advanced interface forms are installed with Service Request Management by default:

- SRS:AdvancedInterface_PasswordReset form (Password Reset)
- SRS:AdvancedInterface_WithoutBackendMapping form (Without Backend Mapping), with a few custom fields already provided
- SRS:AdvancedInterface_WithBackendMapping form (With Backend Mapping), with tabs to hold advanced interface data fields and mapped data fields

Use the Configure Advanced Interface Information form to modify the name of the company, advanced interface form, server, and so on to be used when choosing this advanced interface data record. You can also disable these advanced interface forms. If you configure an advanced interface form to be inactive, SRM Administrators will not be able to select it as an advanced interface template option when creating SRDs.

The advanced interface form feature also gives SRM Administrators the option of creating an advanced data entry screen instead of the default window used in the Request Entry console for completing details. You can also register new advanced interface forms.

NOTE

You must have SRM Administrator permissions to access this form.

For detailed information, see the advanced interface form appendix in the *BMC Service Request Management 2.2.00 Administrator's Guide*.

► To register advanced interface forms

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Advanced > Configure Advanced Interface data, then click Open.

The Configure Advanced Interface Information form appears.

Figure 7-1: Configure Advanced Interface Information form

- 3 To modify an advanced interface form, perform the following actions:
 - a Open the Configure Advanced Interface Information form in Search mode.
 - b Search for a record.
 - c Modify the information as needed, for example, select a different company or disable the advanced interface template.
 - d Save your changes.
- 4 For advanced modification of the advanced interface forms, perform the following actions:
 - a Log in to your server using BMC Remedy Administrator.
 - b From BMC Remedy Administrator, open one of the advanced interface forms:
 - SRS:AdvancedInterface_PasswordReset
 - SRS:AdvancedInterface_WithoutBackendMapping
 - SRS:AdvancedInterface_WithBackendMapping
 - c Modify the form as needed.

For example, you can open the SRS:AdvancedInterface_WithBackendMapping form and add your own advanced interface fields as needed.
 - d Save your modifications.

The next time log out and log in to your system, and then you open the form, your changes will be displayed.
- 5 To create your own advanced interface form, perform the following actions:
 - a Log in to your server using BMC Remedy Administrator.
 - b From BMC Remedy Administrator, create an advanced interface form.

Use the same naming convention and location on the AR System server as the other advanced interface forms, for example, SRS:AdvancedInterface_Questions.

- c Open the Configure Advanced Interface Information form in New mode.
 - d Specify a company.
 - e Enter a template name.
This name will appear in the Custom Template field on the Service Request Definition form.
 - f Enter the form name and location as it appears on the AR System server.
For example, if you are creating your own advanced interface form, you might enter `SRS:AdvancedInterface_Questions`.
 - g Specify the server.
Enter the fully-qualified domain name.
 - h Specify its status, either Active (enabled) or Inactive (disabled).
 - i Click Save.
- Service Catalog Managers can now choose this advanced interface template from the Custom Template field when they are creating SRDs.

Configuring type fields in the Work Order Template form

IMPORTANT

You configure the Type Fields exclusively for use with advanced interface forms.

The Type Fields tab specifies static-content fields you can include with this work order template. This functionality is especially useful for work orders because you can include up to four character fields (255-character limit each), two date/time fields, and two integer fields for users to add information to their work order.

For detailed information on creating work order templates, see “Configuring work order templates” on page 45. For detailed information on using type fields with advanced interface forms, see the *BMC Service Request Management 2.2.00 Administrator's Guide*.

► To configure type fields

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Work Order > Work Order Template, and then click Open.

The Work Order Template form appears.

- 3 Click the Type Fields tab.

Figure 7-2: Work Order Template form—Type Fields tab

Classification	Tasks	Assignment	Type Fields																											
<div>Field Labels</div> <div>Field Values</div> <table><tr><td>Last Name of work order master</td><td>Enter last name here</td><td>...</td></tr><tr><td>First Name of work order master</td><td>Enter first name here</td><td>...</td></tr><tr><td>Notes</td><td>Include any notes on the work order or tasks here</td><td>...</td></tr><tr><td>Not Used</td><td></td><td>...</td></tr><tr><td>Not Used</td><td></td><td>...</td></tr><tr><td>Date needed</td><td></td><td>...</td></tr><tr><td>Date completed</td><td></td><td>...</td></tr><tr><td>How long (min) did the task take?</td><td>30</td><td>...</td></tr><tr><td></td><td></td><td>...</td></tr></table>				Last Name of work order master	Enter last name here	...	First Name of work order master	Enter first name here	...	Notes	Include any notes on the work order or tasks here	...	Not Used		...	Not Used		...	Date needed		...	Date completed		...	How long (min) did the task take?	30
Last Name of work order master	Enter last name here	...																												
First Name of work order master	Enter first name here	...																												
Notes	Include any notes on the work order or tasks here	...																												
Not Used		...																												
Not Used		...																												
Date needed		...																												
Date completed		...																												
How long (min) did the task take?	30	...																												
		...																												

- 4 Enter field labels as they should appear on the work order.
The first four type fields are character fields to enter “free form” information. The fifth and sixth type fields are date/time fields to store calendar dates and time together. The last two type fields are integer fields that you can use to keep track of numeric information. You can include only whole numbers, not decimals or floating-point numbers.
- 5 Enter any default field values that you want to appear next to the field labels.
- 6 Click Save.

8 Configuring SRM to work with third-party applications

This section describes how to configure SRM to work with third-party applications. Configuration tasks are performed from the Application Administration Console.

NOTE

Only users with SRM Administrator permissions can configure SRM.

The following topics are provided:

- Configuring SRM to use third-party applications (page 154)
- Registering applications (page 154)
- Configuring event commands (page 157)
- Registering the form fields for the application (page 167)
- Defining target data from third-party applications (page 169)

Configuring SRM to use third-party applications

This section provides the bare *minimum* of information to configure third-party external applications to work with SRM.

The Change Management, Incident Management, and Work Order Management applications all use the same mechanisms to integrate with SRM. They all include a set of AR System forms that provide the ability to create, query, and modify requests in these back-office fulfillment applications. They also include web service interfaces that are built on top of these forms to provide external systems a mechanism to programmatically interact with these back office systems.

SRM is integrated with the Incident Management, Change Management, and Work Order Management using CAI and these interface forms. The interface forms for the CAI not only support communication from SRM to the back-office fulfillment applications, but also from the back-office fulfillment applications to SRM. For more information about the CAI subsystem, see the *BMC Remedy IT Service Management 7.0 Architecture* White Paper and the *BMC Service Request Management 2.0 Architecture* White Paper.

For your own integration with SRM, you would have to create your own interface forms, web services, application templates, and so on. For information on web services, see the *Automating Service Request Creation Using Web Services in BMC Service Request Management 2.0* White Paper.

Registering applications

IMPORTANT

This information is required to use SRM with custom applications. The SRM application is registered by default to work properly with Incident Management and Change Management applications. If you are not registering a third-party application to work with SRM, you can proceed to “Creating application templates” on page 43.

All back-end applications that are used with SRM must be registered. Use the Application Registry form to register the applications that are used with SRM, and to identify key elements of the back-end application, such as template forms, interface forms, instance forms, and so on.

The back-end application that is using SRM needs to be registered in the Application Registry form. The registry entry is the means for SRM to recognize the back-end application, set the configuration settings such as mode of connection (local or remote), server and template information, and to use this information to set context for the rest of the SRM entities (registered fields, questions, commands, PDTs, PDIs, AOTs, and AOIs). For more information about these SRM entities, especially PDTs and AOTs, see the *BMC Service Request Management 2.2.00 Administrator's Guide*.

By default, the SRM application is configured to work with Remedy Change Management and Remedy Incident Management. But you can register other applications to work with SRM, for example, BMC Service Desk Express Suite.

Use the Application Registry form to modify any of the preconfigured information or create new application registries if your organization is going to use SRM with other applications.

► To register an application

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Advanced Options > Command Automation Interface - Application Registry, and then click Open.

The CAI Application Registry form appears in New mode.

- 3 Optionally, click the New Search toolbar button, and then click Search to view the preconfigured application registry information.

You can modify any of the fields, as appropriate.

- 4 Enter the following *required* information:

Field Name	Description
Registry Name	Enter a unique name for the application that you are registering.
Description	Enter a description of the application that you are registering.
Status	Select a status for this entry. The options are New, Active, and Inactive.

5 On the General tab, enter the following information:

Field Name	Description
Application Name	Select the application that you are registering from the menu list. The list is populated from the SHARE:Application_Properties form.
Template Form	<p>Select the form that identifies the template.</p> <p>SRM needs to identify the templates to use for pushing requests and incidents. These templates should already exist in the back-end application.</p> <p>This form identifier is the same value as the Keyword field in the SHR:SchemaNames form.</p> <p>Note: This is currently SRM:SampleAppTemplate for the SRM Sample application.</p>
Template View Form	<p>Select the form that is the front-end or view form (the form that the back-end user sees) for the template form you selected.</p> <p>The view form should already exist in the back-end application.</p>
Instance Form	<p>Select the form that identifies the application instance. If an interface form name is not specified, the value from this field is used.</p> <p>The application instance form identifier is the same value as the Keyword field in the SHR:SchemaNames form.</p> <p>The application instance is the actual request entry that will be created when the service request is submitted, based on the template, if a template is used. Some back-end applications might choose not to use a template structure. The form identifier (or Template Form field) identifies the back-end request form that will be used to create the entry.</p> <p>Note: For the work order application entry, the Instance Form is WOI:WorkOrder.</p>
Interface Form	<p>Designate the form identifier for SRM to interact with when initiating back-end application requests. SRM pushes data into this form to initiate outbound commands.</p> <p>Note: For the work order application entry, the Interface Form field is WOI:WorkOrderInterface_Create.</p>
New Request Activation	<p>Setting depends on functionality of the back-end application.</p> <ul style="list-style-type: none"> ■ If you select Yes, for example, with SRM, the AOI sends the activate event command (SRM_OUT_ACTIVATE_APP_REQUEST) that moves the instantiation of the back-end request beyond a New or Draft state. ■ If you select No, you assume the application itself knows how to activate the instance. <p>For more information on event commands, see “Configuring event commands” on page 157.</p>

6 Click the Connection tab.

7 Enter or update the following information:

Field Name	Description
Access Mode	Specify whether the registered back-end application is on a local or remote server. <ul style="list-style-type: none"> ■ Local—Same server where SRM is installed. ■ Remote—Different server where your back-end application is installed.
Server	The server name where the application you are registering is installed.
Protocol	Determine the communication format for data exchange: <ul style="list-style-type: none"> ■ AR ■ URL ■ Web services ■ Command Line ■ Plug-in ■ Other BMC applications use various protocols. For example, SRM and BMC Remedy IT Service Management 7.0 use the AR protocol, but BMC Configuration Management uses the URL protocol.
Login	Fill in this field if you selected Access Mode as Remote. Enter your login name to access the remote back-end application used for requests.
Password	Fill in this field if you selected Access Mode as Remote. Enter your password to access the remote back-end application used for requests.
Port #	Fill in this field if you selected Access Mode as Remote. Enter the port number of the remote back-end application used for requests.
Maximum Retries	Specify the number of times the application should keep trying to run an event command. The default setting is 3.

8 Click Save, and then click Close.

Configuring event commands

— **IMPORTANT** —

This information is required to use SRM with custom applications. The SRM event commands are configured by default to work properly with Incident Management and Change Management applications and Work Orders.

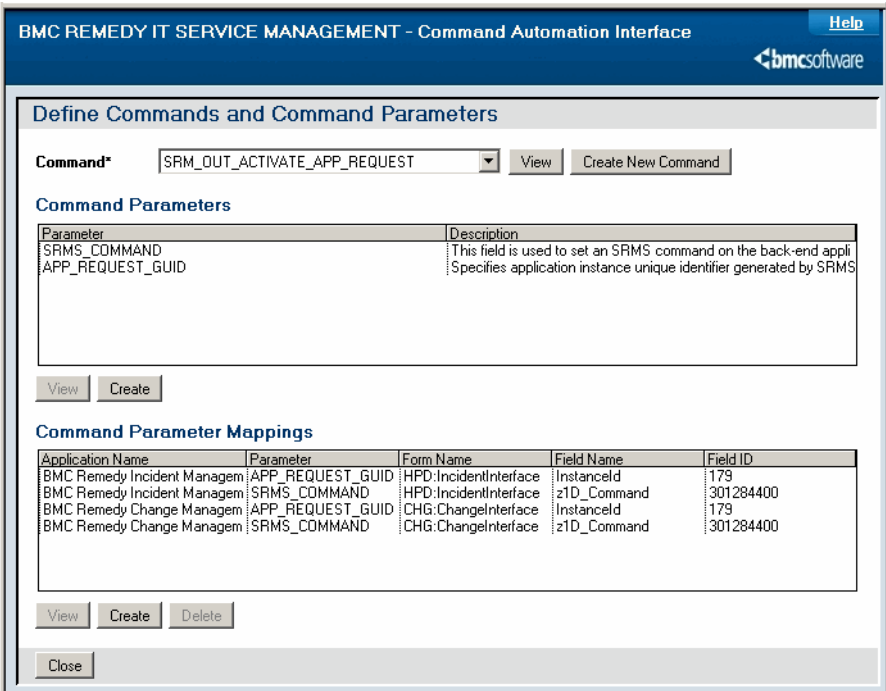
Event commands and their parameters are used to communicate to the back-end applications (like Change Management, Incident Management, Work Orders, or some third-party application) to create and update service requests, and to synchronize activity in them. The type of information being synchronized includes status updates and work log activities.

When configuring events with their command parameters, you map fields from the application interface form to the SRM framework command parameters. SRM uses the mapping definition when sending events to the back-end application interface form. The command parameter values are copied to the fields specified by the field ID in the mapping.

For more information, see the *BMC Remedy IT Service Management 7.0 Architecture* white paper.

For this configuration step, you map the application fields that you registered for SRM field mapping to event command parameters.

Figure 8-1: Viewing a command parameter and its mappings



Command parameters enable data to be communicated between SRM and the back-end applications. SRM includes a Filter API to facilitate the communication between SRM and an AR System back-end application.

The field mappings that you specified determine to which fields data is copied.

Viewing event commands and command parameters

You can view the predefined commands and their command parameters that are installed with SRM.

► To view event commands and command parameters

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Advanced Options > Command Automation Interface - Define Command Parameters, and then click Open.

The Define Command and Command Parameters form appears.

- 3 From the Command field, select an event command, and then click View.

The Command form opens. The following figure shows the SRM_IN_APP_REQUEST_RESPONDED command.

Figure 8-2: Viewing an event command

The screenshot shows the 'Commands' form in the BMC Software application. The form is titled 'Commands' and has a 'Help' button in the top right corner. The main section contains the following fields:

- Command***: SRM_IN_APP_REQUEST_RESPONDED
- Status***: Active (dropdown menu)
- Direction***: Inbound (dropdown menu)
- Operation Type***: Create (dropdown menu)
- Command Type**: Append (dropdown menu)
- Description***: Notifies SRMS back-end app request is responded to for SLM calculation.

Below the main section is the 'System Information' section, which contains the following fields:

- Request ID**: CMD000000000026
- Create Date**: 01/24/2006 11:01:05 a.m.
- Submitter***: dev_hyb
- Last Modified By**: dev_hyb
- Selection Type***: Event (dropdown menu)
- Modified Date**: 01/30/2006 5:09:31 p.m.
- DataTags**: Config-SRM

At the bottom of the form are two buttons: 'Save' and 'Close'.

The following commands are available for you to view:

Command name	Description
SRM Command (inbound for application requests)	<p>Select the appropriate <i>inbound</i> command from SRM to the registered application:</p> <ul style="list-style-type: none"> ■ SRM_IN_APP_REQUEST_CANCELLED—Notifies SRM back-end application that the service request is cancelled. ■ SRM_IN_APP_REQUEST_IN_PROGRESS—Notifies SRM back-end application that the service request is in progress. ■ SRM_IN_APP_REQUEST_PENDING—Notifies SRM back-end application that the service request is in pending. ■ SRM_IN_APP_REQUEST_REJECTED—Notifies SRM back-end application that the service request is rejected. ■ SRM_IN_APP_REQUEST_RESOLVED—Notifies SRM back-end application that the service request is done ■ SRM_IN_APP_REQUEST_RESPONDED—Notifies SRM back-end application that the service request is responded to for SLM calculation.
SRM Command (inbound for push application requests and updates)	<p>Select the appropriate <i>inbound</i> command from SRM to the registered application for push application requests and updates:</p> <ul style="list-style-type: none"> ■ SRM_IN_PUSH_APP_REQUEST_INFO—Sends an application request information data to SRM from the back-end application. Data recognized by SRM is defined in the command parameters. ■ SRM_IN_PUSH_APP_REQUEST_OWNER—Sends an application request owner data to SRM from the back-end application. Data recognized by SRM is defined in the command parameters. ■ SRM_IN_UPDATE_SR_WORKLOG—Creates a work log entry for the service request.
SRM Command (outbound for application requests)	<p>Select the appropriate <i>outbound</i> command from SRM to the registered application:</p> <ul style="list-style-type: none"> ■ SRM_OUT_ACTIVATE_APP_REQUEST—Notifies the application instance to start working on the request. The back-end application must define how to execute upon receiving this notification. ■ SRM_OUT_CANCEL_APP_REQUEST—Notifies the application instance that the service request is canceled. The back-end application must define what to do with this cancellation notification. ■ SRM_OUT_CREATE_APP_REQUEST—Creates an application instance in the back-end application. ■ SRM_OUT_GET_APP_REQUEST_INFO—Gets information (such as status, description, ID, cost, and so on) from the application instance that was created on the back-end application. ■ SRM_OUT_PUSH_SR_INFO—Sends service request data to the back-end application when a new service request is created from the Service Request interface form. Specific data that are sent as part of this command is defined in the command parameters. ■ SRM_OUT_REOPEN_APP_REQUEST—Sends an event to back-end application to reopen an application request. ■ SRM_OUT_RESOLVE_APP_REQUEST—Sends an event to the back-end application to resolve the application request, such as in the case of resolving an Incident ticket using a solution record. ■ SRM_OUT_UPDATE_APP_REQUEST_WORKLOG—Creates a work log entry for the application request.

Command	Description
Change Management Command (outbound for application requests)	Select the appropriate <i>outbound</i> command from Change Management to the registered application: <ul style="list-style-type: none"> ■ CHG_OUT_CMS_CONFMAN—Launches BMC Configuration Manager.
Task Management Command (outbound for application requests)	Select the appropriate <i>outbound</i> command from Task Management to the registered application: <ul style="list-style-type: none"> ■ TMS_OUT_CMS_CHKCOMPLIANCE_STATUS—Requests BMC Configuration Management Check Compliance Status. ■ TMS_OUT_CMS_DEPLOYMENT BMC—Launches Configuration Management Deployment Manager. ■ TMS_OUT_CMS_POLICYMGR—Launches BMC Configuration Management Policy Manager. ■ TMS_OUT_CMS_REMOTECTRL—Launches BMC Configuration Management Remote Control. ■ TMS_OUT_CMS_REMOTESCRIPT—Launches BMC Configuration Management Remote Script. ■ TMS_OUT_CMS_VERIFYTASK—Launches BMC Configuration Management Verify Task. ■ TMS_OUT_GET_DATA—Queries form for data.

- 4 Close the Command dialog box when you are finished viewing the command and its parameters.

Defining event commands and command parameters

After defining an entry in the Application Registry form, you must define the commands and command parameters.

► To define event commands and command parameters

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Advanced Options > Command Automation Interface - Define Command Parameters, and then click Open.

The Define Command and Command Parameters form appears.
Figure 8-3: Define Commands and Command Parameters form

The screenshot shows the 'Define Commands and Command Parameters' form. At the top, there's a header bar with 'BMC REMEDY IT SERVICE MANAGEMENT - Command Automation Interface' and a 'Help' link. Below the header, the form is divided into sections. The first section is 'Define Commands and Command Parameters', which includes a 'Command*' dropdown menu, a 'View' button, and a 'Create New Command' button. The second section is 'Command Parameters', which has a table with columns 'Parameter' and 'Description'. The table is currently empty, and there's a 'Click to Refresh' link. Below the table are 'View' and 'Create' buttons. The third section is 'Command Parameter Mappings', which has a table with columns 'Application Name', 'Parameter', 'Form Name', 'Field Name', and 'Field ID'. This table is also empty, with a 'Click to Refresh' link. Below this table are 'View', 'Create', and 'Delete' buttons. At the bottom of the form is a 'Close' button.

- 3 Click Create New Command.
The Commands form appears.

Figure 8-4: Defining a new command parameter

The screenshot shows the 'Commands' form. At the top, there's a header bar with 'bmcsoftware' and a 'Help' link. Below the header, the form is divided into sections. The first section is 'Commands', which includes a 'Command*' dropdown menu with the value 'SRM_OUT_ACTIVATE_APP_REQUEST', a 'Status*' dropdown menu with the value 'Active', a 'Direction*' dropdown menu with the value 'Outbound', an 'Operation Type*' dropdown menu with the value 'Update', a 'Command Type' dropdown menu with the value 'Append', and a 'Description*' text area with the value 'This sends an event to back-end application to active an application request.' Below this section is a 'System Information' section, which includes a 'Request ID' field with the value 'CMD000000000001', a 'Submitter*' dropdown menu with the value 'Demo', a 'Selection Type*' dropdown menu with the value 'Event', and a 'DataTags' field with the value 'Config-SRM'. There are also fields for 'Create Date' (06/28/2005 9:57:38 a.m.), 'Last Modified By' (dev_hyb), and 'Modified Date' (01/30/2006 5:09:31 p.m.). At the bottom of the form are 'Save' and 'Close' buttons.

The preceding figure shows the SRM_OUT_ACTIVATE_APP_REQUEST command provided for you with the SRM installation. The SRM_OUT_ACTIVATE_APP_REQUEST command is a good example of the type of command you can create to communicate to your own back-end applications.

- 4 Enter information in the fields to create a new command and parameters:

Field Name	Description
Command	Enter a name for this command.
Direction	Select one of the following items: <ul style="list-style-type: none"> ■ Inbound—Inbound from the application to the task management system. ■ Outbound—Outbound from the task management system to the application. For more information, see the <i>BMC Remedy Task Management System 7.0 Administrator's Guide</i> .
Operation Type	Select one of the following items: <ul style="list-style-type: none"> ■ Create—Creates a new request. ■ Get—Gets information from a request. ■ Update—Updates a request.
Command Type	Optionally select one of the following items: <ul style="list-style-type: none"> ■ Append—Contains a series of commands followed by a series of parameters. ■ Interleave—Contains a series of alternating commands and parameters.
Description	Enter a description.
Selection Type	Select Event.
Status	Select a status.

- 5 Click Save.

Defining command parameters

When you configure an event command, you must also define its command parameters.

► To define command parameters

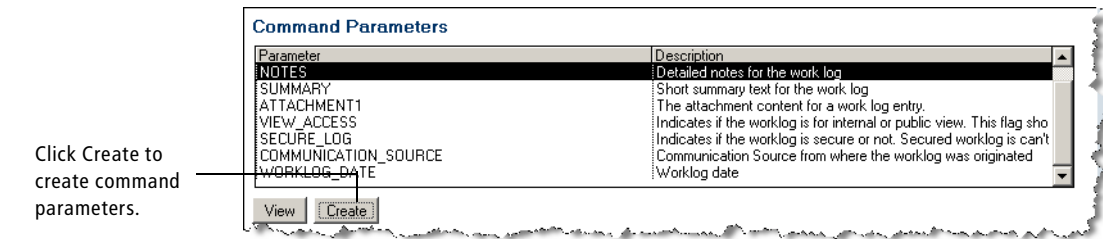
- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Foundation > Advanced Options > Command Automation Interface - Define Command Parameters, and then click Open.

The Define Command and Command Parameters form appears.

- 3 Select a command.

Any command parameters that are already defined are displayed in the Command Parameters table.

Figure 8-5: Command parameters displayed in Command Parameters table



4 Click Create.

The Command Parameters form appears.

Figure 8-6: Command Parameters form

You can click the View button if you just want to look over the command parameters.

5 Enter the parameter fields (*required*) to specify the type of information that is pulled from the back-end application:

Field Name	Description
Command	This information is filled in automatically.
Parameter	Argument passed to the event command.
Type	Select one of the following items: <ul style="list-style-type: none">■ In—Inbound from the application to SRM.■ Out—Outbound from SRM to the application.■ Qual—Parameter is used as a qualification. For example, if the parameter name is 179 and the parameter value is 12345, CAI converts this to '179' = "123345".
Data Type	Select one of the following return parameters: <ul style="list-style-type: none">■ Character—254 character length.■ Attachment—Attachment type data field.■ 0-Length Char—Character field of unlimited length.

Field Name	Description
Mode	Optionally select one of the following items: <ul style="list-style-type: none"> ■ Optional—Field is optional. ■ Required—Field is mandatory.
Status	Select a status, for example, Active.
Description	Enter a useful description of the command parameter.

- 6 Save your changes and close the Command Parameters dialog box.

Defining command parameter mappings

Define mappings between the parameters defined on the Command Parameter form and the Interface Form that you specified on the Application Registry form (as described in “Creating application templates” on page 43).

► To define command parameter mappings

- 1 On the Define Commands and Command Parameters form, select the command to define mappings for.
- 2 Click the Create button below the Command Parameter Mappings table.

Figure 8-7: Define Commands and Command Parameters form

BMC REMEDY IT SERVICE MANAGEMENT - Command Automation Interface

Help

bmcsoftware

Define Commands and Command Parameters

Command* View Create New Command

Command Parameters

Parameter	Description
Click to Refresh	

View Create

Command Parameter Mappings

Application Name	Parameter	Form Name	Field Name	Field ID
Click to Refresh				

View Create Delete

Close

Click Create to create mappings.

The Command Parameter Mappings form appears.

Figure 8-8: Command Parameter Mappings form

The screenshot shows the 'Command Parameter Mappings' form in the BMC Software interface. The form is organized into several sections:

- App Registry Name***: A dropdown menu.
- Command***: A dropdown menu.
- Status***: A dropdown menu with 'Active' selected.
- Order**: A numeric input field.
- Parameter** section:
 - Name***: A dropdown menu.
 - Type***: A dropdown menu.
 - Data Type***: A dropdown menu.
- Application Fields** section:
 - App Interface Form**: A text input field with a search icon.
 - Field Name**: A text input field with a dropdown arrow and a search icon.
 - Field ID**: A text input field.
- System Information** section:
 - Request ID**: A text input field.
 - Submitter***: A text input field with 'Demo' entered.
 - DataTags**: A text input field.
 - Create Date**: A date input field with a search icon.
 - Last Modified By**: A text input field with a search icon.
 - Modified Date**: A date input field with a search icon.
- At the bottom are **Save** and **Close** buttons.

3 Enter information in the fields:

Area	Field name	Description
Application Registry and Command information	App Registry Name	Select the application you registered on the Application Registry form. For more information, see “Registering applications” on page 154.
	Command	You can use the selected command or select a command that you defined.
	Status	Select a status.
	Order	Specify the order in which the parameters are used. The order is necessary for URL type commands. Note: By default, the order is zero.
Parameter—Select a parameter that you defined for the selected command on the Command Parameters form.	Name	Select the parameter name. The menu list values are derived from the SRM:CommandParams form, which is currently a back-end form. These are possible SRM parameters or fields that can be mapped to the back-end application’s request fields for each command.
	Type	This is filled in automatically.
	Data Type	This is filled in automatically.

Area	Field name	Description
Application Fields—You map an application field to an appropriate field on the Application Registry form.	App Interface Form	Select the form name or enter it manually. The form name that you select should match the value of the Interface Form field, which you specified on the Application Registry form, for the registered application.
	Field Name	Select a field from the menu of registered applications, or enter it manually.
	Field ID	Enter the field ID of the field you selected for the Field Name field. If you selected a registered field from the Field Name menu list, then this field will populate automatically. You may also enter this value manually.

- 4 Click Save.
- 5 Click the View button if you just want to look over the command parameters.
- 6 If you want to delete a command parameter mapping, select one from the table and then click Delete.

Registering the form fields for the application

After you register the applications that will be used with SRM and register the application template forms from the applications you registered, you must select and register form fields that map to questions that the end user is prompted to answer. (Responses to questions are mapped at the time the back-end request is created.) The answer values are pushed to the form fields of the back-end applications that use SRM.

You also map event command parameters to the registered form fields. These command parameters enable data to be communicated from SRM to the registered back-end applications. Command parameters are used both upon submission and subsequent queries or modifications to and from the back-end request records. Mapping the fields allow data to be stored in the appropriate fields on the back-end request record.

► To register form fields

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Application Configuration > Define Application Field, and then click Open.

The Form Field Selection form appears in New mode.

Figure 8-9: Form Field Selection form

BMC REMEDY IT SERVICE MANAGEMENT

Help

bmcsoftware

Form Field Selection

Form Field Selection ID

FLS

Status

Enabled

Selection Type

Module Name

Notification Event

Form Name

Select Fields From

Show display only fields

☐ Yes

Menu Label 1

Menu Value 1

Menu Value 2

Menu Order 1

Selection Code

Locale

Schemald

Field ID

Data Type

Entry Mode

Default Value

Description

Submitter

john_admin

Last Modified By

Action

Submit Date

Last Modified Date

Data Tags

Save

Close

3 Enter information in the *required* fields:

Field Name	Description
Status	Select a status of Enabled.
Selection Type	Select Question Field Mapping or SRMS Field Mapping. <ul style="list-style-type: none">■ Select Question Field Mapping for mapping application fields to the questions. The user’s answers to the questions will be pushed to and stored in these fields.■ Select SRMS Field Mapping for mapping application fields to command parameters. This is configuration data that is provided by default.
Module Name	Select the module or application that you registered.
Form Name	Select the name of the form that stores the field.
Select Fields From	The is the same value as the Form Name field.
Menu Label 1	Select the field that will be used. This is the display name of the field.
Submitter	This is a system-generated field that is populated with the user’s login name.

4 Enter information in the *optional* fields:

Field Name	Description
Notification Event	Note: This field is not used by SRM.
Show display only fields	Allows you to register a display-only field. By default, this field is disabled.
Menu Value 1	Enter the value of the field selected for Menu Label 1. This is the stored value of the field. In some cases, it might be the same value as Menu Label 1.
Menu Value 2	This field will store the field ID of the selected field.
Menu Order 1	Specify the order for this menu item as it will appear in the list.
Selection Code	Note: This field is not used by SRM.
Locale	Enter a locale in which this field will be available.
SchemaId	Read-only field that displays schema ID of underlying form.
Field ID	Enter the field ID of the field to register.
Entry Mode	Specify if the field is Required or Optional.
Default Value	Enter a default value or a keyword (for example, \$\USER\$).
Description	Enter additional information about the field.

5 Click Save.

Defining target data from third-party applications

This section describes how to define the third-party application target data that you use with questions.

— **IMPORTANT** —

This information is important if you are using SRM with custom applications. Target data for Work Orders is provided by default with the installation of SRM. For the Change Management and Incident Management applications, the data is provided with the integration installer. If you are not defining target data for a third-party application to work with SRM, you can skip to “Defining application object templates (AOTs)” on page 52 or “Defining the Questions Library entries” on page 68.

► To define application target data

- 1 From the Application Administration Console, click the Custom Configuration tab.
- 2 From the Application Settings list, choose Service Request Management > Application Configuration > Define Application Target Data, and then click Open.

The Application Target Data form appears in New mode.

Figure 8-10: Application Target Data form

The screenshot shows the 'Application Target Data' form in the BMC Service Request Management application. The form has a blue header with the title and a 'Help' button. Below the header, there are several input fields and dropdown menus. The 'Status*' field is set to 'Active'. The 'Registered Application*' and 'Field For Answer*' fields are empty. The 'Field ID' field is disabled. The 'Field Length' field has a range of 1 to 255. The 'Prepopulate Mode' field is set to 'None'. The 'Prepopulate Value Type' field has three radio buttons: 'Keyword', 'SRM Fields', and 'None', with 'None' selected. The 'Prepopulate Value' field is empty. The 'Prepopulate Value Field ID' field is empty. The 'Required By Application' field is set to 'No'. The 'O-Len Char' field is empty. The 'Mode' field is set to 'Pull'. The 'Exposed To Template' field is set to 'Yes'. At the bottom of the form, there are 'Save' and 'Close' buttons.

- 3 Enter the following *required* information:

Field Name	Description
Status	Select Active if you want this data to be visible.
Registered Application	The registered application to which the answer will be pushed. This is the value you specified for the Registry Name field on the Application Registry form.
Field For Answer	The field that will store the data. This is a field that you registered in “Registering the form fields for the application” on page 167 for question field mapping.

4 Enter the following *optional* information:

Field Name	Description
Description	Lets administrators include descriptive text about the field.
Field ID	<p>The field ID of the field that stores the answer.</p> <p>Note: This field is auto-populated with the field ID of the field selected in Field For Answer.</p>
Field Length	<p>Lets you define the length on the fulfillment application. The value in this field is used to truncate the value to match the field length on the back-end application before passing it to the CAI. If the truncation occurs, the worklog is added to the service request with the following information:</p> <ul style="list-style-type: none"> ■ Application ■ Field name ■ Length ■ Value <p>Note: Not <i>all</i> the fields in the Work Order application, nor <i>any</i> of the fields in the Change Management or Incident Management applications, are defined with Field Length settings out-of-the-box. If you are passing data from SRM to a back-end application, make sure you set the proper field length values. Otherwise, you might see errors in the CAI events trying to create records in the back-end applications, because data from one of the fields in the service request is too long. For more information, see the troubleshooting tips section in the <i>BMC Service Request Management 2.2.00 Administrator's Guide</i>.</p>
Prepopulate Mode	<p>Choose an option for the field that stores the answer to hold if the user does not answer the question, if the question is not visible to the user, or just as a placeholder. The choices are:</p> <ul style="list-style-type: none"> ■ Default/User Entry—A default value is stored in the field. If you select this option, enter a default value in the Prepopulate Value field. If you select the Default/User entry mode, any value defined here is <i>not</i> used in the Request Entry console. ■ Predefined—A predefined value is stored in the field. If you select this option, enter a predefined value in the Prepopulate Value field. If you select the predefined populate mode, the value defined here is used in the Request Entry console. ■ System Generated—A system generated value is stored in the field, for example, from the workflow. If you select this option, the Prepopulate Value field is grayed out. The answer will be generated by the back-end request. No default configuration data is providing using the System Generated prepopulate mode.

Field Name	Description
Prepopulate Value Type	<p>Select the type of menu that will be attached to the Prepopulate Value field. The options are:</p> <ul style="list-style-type: none"> ■ Keyword—A menu list containing AR System keywords appears next to the Prepopulate Value field. ■ SRM fields—A menu list containing fields from registered SRM application forms appears next to the Prepopulate Value field. The menu list values come from the SYS:Form Field Selection form, when the Selection Type is set to SRM Field Mapping. ■ None—The user will enter a value in the Prepopulate Value field.
Prepopulate Value	Select or enter the prepopulated value if you selected default or predefined for Prepopulate Mode. The menu attached to the Prepopulate Value field also depends on your selection for the Prepopulate Value Type field.
Prepopulate Value Field ID	<p>When you select the following options:</p> <ul style="list-style-type: none"> ■ Prepopulate mode of Default/User Entry or Predefined ■ SRM fields prepopulate value type <p>the Field ID is automatically entered after you select a prepopulate value.</p>
Required By Application	<p>Specify whether this field is required or optional.</p> <p>If this field is required, the user must supply an answer for the question when submitting a service request.</p> <p>The default setting is No.</p>
0-Len Char	Abbreviation for zero-length character field. If you specify Yes, you allow the character field to be unlimited length for users to add input.
Mode	<p>Specify how you to handle the target data in the Registered Application:</p> <ul style="list-style-type: none"> ■ Pull—Pulls the task data from the registered application for use by the data input definitions. ■ Push—Pushes the task data into the registered application. ■ Get—Retrieves the task data from the registered application. <p>The default setting is Pull.</p> <p>Note: Only the Pull mode is currently supported.</p>
Exposed To Template	Specify if you want to exposed the target data when you associate it to AOTs. The default setting is Yes.

- 5 Click Preview to view how the question and answer format will appear to the end user.
- 6 Click Save.

IMPORTANT

When SRM data (from user input to questions or target data from configuration) is passed to the back-end applications, not all applications process this data in the same way. In Incident Management and Change Management, SRM data takes precedence over the template data. However, for Work Orders, the values from work order templates takes precedence over SRM data.

9 Performing standard configuration

This section describes the Standard Configuration tab of the Application Administration Console. You use the Standard Configuration tab to perform the standard configuration steps to configure your organization's information.

The following topics are provided:

- [Introducing the Application Administration Console \(page 176\)](#)
- [Opening the Application Administration Console \(page 177\)](#)
- [Performing a standard configuration \(page 179\)](#)
- [Creating a new company \(page 181\)](#)
- [Creating organizations \(page 182\)](#)
- [Creating locations \(page 182\)](#)
- [Creating support groups \(page 184\)](#)
- [Creating people information \(page 185\)](#)
- [Creating product categories \(page 187\)](#)
- [Creating operational categories \(page 189\)](#)
- [Creating assignment routing for SRM \(page 191\)](#)
- [Viewing and modifying standard configuration data \(page 193\)](#)

Introducing the Application Administration Console

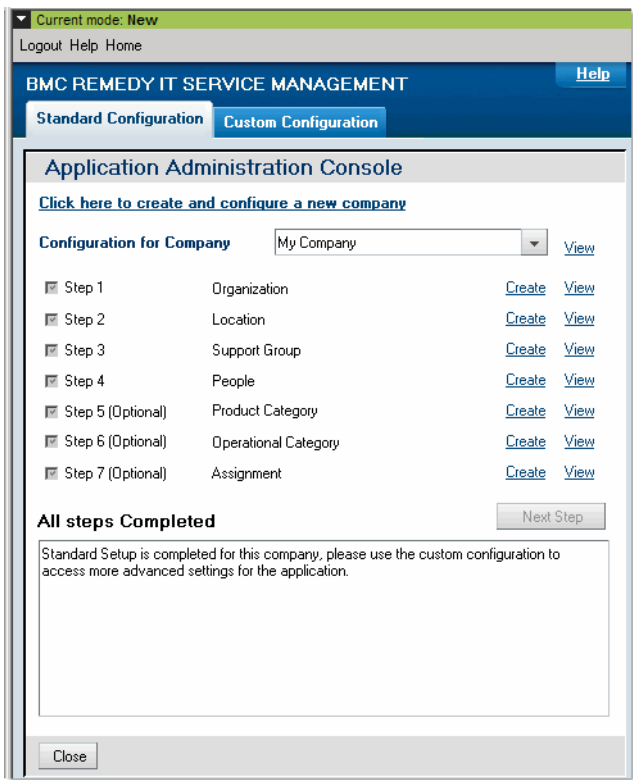
You configure the BMC Service Request Management (SRM) application using the Application Administration Console. In the console, you see only common items and items for the applications that you have installed. The configuration forms are available only to AR System administrators and application administrators.

IMPORTANT

Always open forms from this console. If you open the forms directly from the object list in BMC Remedy User, you might not see all the information you need, or you might experience unexpected results.

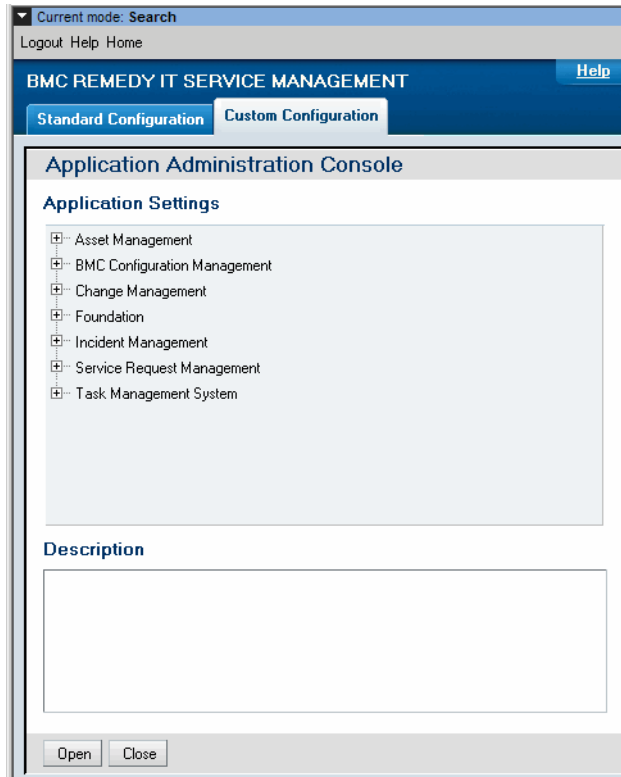
The Application Administration Console has two tabs: Standard Configuration and Custom Configuration. The Standard Configuration tab lists seven steps that walk you through the process of configuring your organization’s information.

Figure 9-1: Application Administration Console—Standard Configuration tab



The Custom Configuration tab provides access to all configuration forms. Use the forms accessed from this tab to go beyond the standard configuration.

Figure 9-2: Application Administration Console—Custom Configuration tab



For more information about configuration, see the *BMC Remedy IT Service Management 7.0 Configuration Guide*.

Opening the Application Administration Console

You can open the Application Administration Console from a browser or BMC Remedy User.

► To open the Application Administration Console from a browser

- 1 Type the following URL into your browser:

`http://<web_server>:<port>/arsys/forms/<arsystem_server>/Home Page`

The variables in the URL are defined as follows:

`<web_server>` is the fully qualified name of the BMC Remedy Mid Tier system, specified in the format `server_name.company.com`.

`<port>` is an optional port number, which is needed if the web server is not on the default port (port 80).

`<arsystem_server>` is the name of the AR System server that contains the application.

NOTE

If the mid tier and the application are on the same system, you can omit the AR System server name.

- 2 In the User Name and Password fields of the Welcome page, enter your user name and password.

- 3 Click Login.

The IT Home page opens in the browser.

- 4 On the IT Home page, click the Application Administration Console link.

The Application Administration Console appears.

For a list of supported browsers, see product compatibility information on the Customer Support website at:

http://www.bmc.com/support_home

► **To open the Application Administration Console from BMC Remedy User**

- 1 Choose Start > Programs > Action Request System > BMC Remedy User.

The Login dialog box appears.

- 2 Enter the login information:

- a In the User Name field, enter the application administrator user name.
- b In the Password field, enter the corresponding application administrator password.
- c In the Preference Server field, specify the name of the preference server if you are using AR System centralized preferences.

NOTE

For information about creating an SRM Administrator, see “Defining the SRM application administrator” on page 17.

- 3 Click OK.

The IT Home page opens automatically.

- 4 If it does not, perform these steps in BMC Remedy User:

- a Choose Tools > Options.
- b In the Options dialog box, click the Home Page tab.
- c Select the check box to open the home page automatically.

- 5 On the IT Home page, click the Application Administration Console link.

The Application Administration Console appears.

Performing a standard configuration

The Standard Configuration tab walks you through the standard process of configuring your organization's information.

If you are performing custom configuration, you can start by performing standard configuration on this tab. If you have an administrative account, you can perform all of the configuration on this tab; if your account is missing a required permission (such as the Config Categorization Admin permission to configure operational categories), you are prompted whether to grant yourself the required permission.

After you finish, you can:

- View and modify standard configuration data, as described in “Viewing and modifying standard configuration data” on page 193.
- Continue to perform custom configuration, as described in “Working with the Custom Configuration tab” on page 68 of the *BMC Remedy IT Service Management 7.0 Configuration Guide*.

► To perform standard configuration by using the Standard Configuration tab

- 1 Open the Application Administration Console, as described in “Opening the Application Administration Console” on page 177.

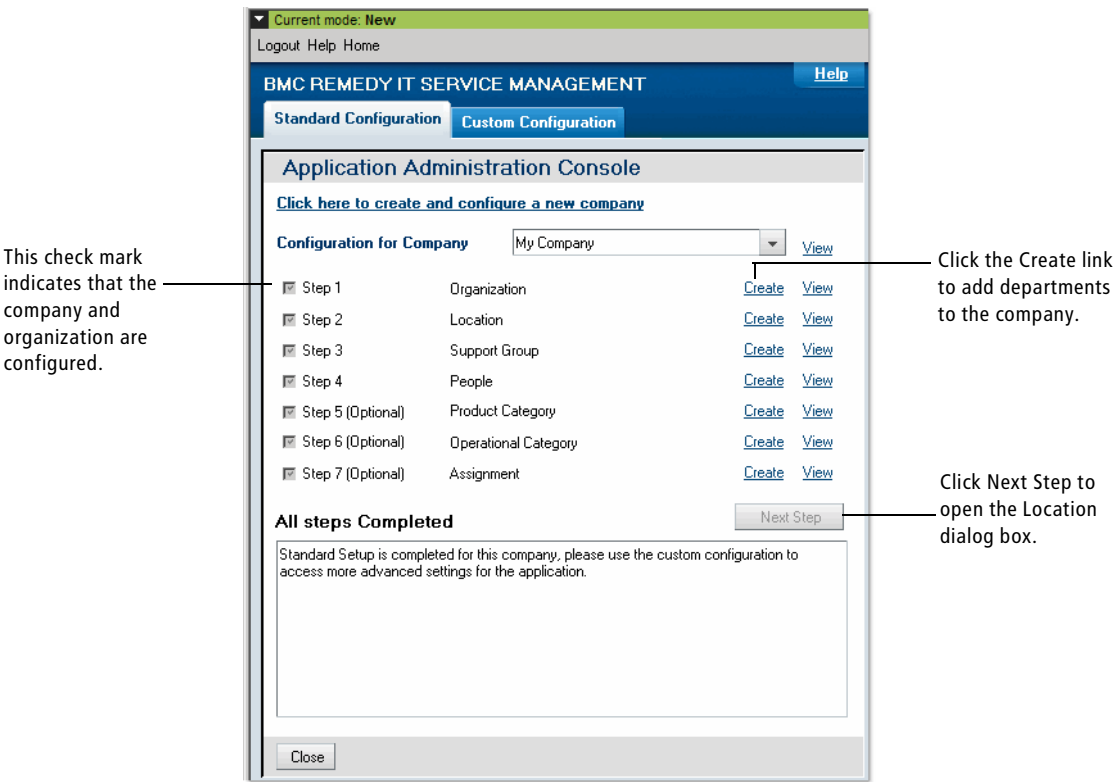
The console opens to the Standard Configuration tab. The Configuration for Company field displays the company currently selected for configuration.

Check marks appear next to each step for which standard configuration has been performed. The instructions at the bottom of the tab list and describe the next step.

NOTE

The instructions at the bottom of the tab apply to the currently selected company.

Figure 9-3: Standard Configuration tab



- 2 You can continue to configure the displayed company, or you can create a new company. To create a new company, follow the procedure described in “Creating a new company” on page 181.

TIP

If you create a new company, but do not complete standard configuration, you can return to this procedure. Select the company you are configuring, and then continue.

- 3 To complete the next step of standard configuration, click Next Step.
The dialog box for the next step of configuration appears.

IMPORTANT

Complete steps in sequence. If you skip a step, you might not be able to complete a subsequent step. For example, you cannot create a people record for support staff unless a support group has been created.

- 4 You can also perform the following actions:
- To create additional configuration records for a step, click the appropriate Create link. For example, to create additional departments for the company, click the Create link next to Company and Organization.
 - To modify or further customize an existing configuration record, click the appropriate View link.

Creating a new company

If your organization is not using My Company, the Company dialog box is the first dialog box that you must complete to build an information database. You can also use the Company dialog box to create additional companies. You can create the following types of companies from this dialog box:

- **Customer**—This company is an external company for which you provide services.
- **Operating Company**—This company is an internal company or business unit for which you provide services.

Both operating companies and customer companies can be used to segregate data defined within other data structures. For example, if a product category is related only to Company A, it appears for Company A but *not* Company B on forms in the SRM.

You can create a third type of company from the Product Category dialog box: **Manufacturer**. This company manufactures a product identified in the Product Catalog.

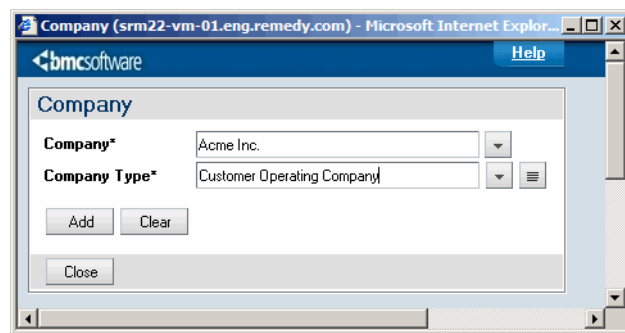
Additional types of companies are available for custom configuration, as described in the *BMC Remedy IT Service Management 7.0 Configuration Guide*.

► To create a new company

- 1 From the Standard Configuration tab of the Application Administration Console, select the company for which you want to create an organization.
- 2 Click the Create link next to Organization.

The Company dialog box appears.

Figure 9-4: Company dialog box



- 3 Enter the company name in the Company field.
- 4 Select the Company Type.
- 5 Click Add.

A message appears that the company has been created. After you click OK, the company is selected on the Standard Configuration tab. You can configure the company, as described in the following sections.

Creating organizations

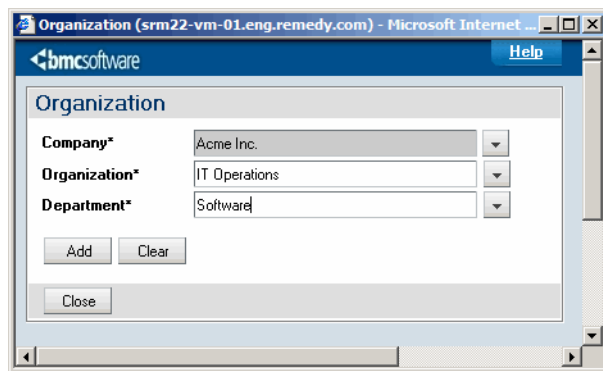
Organization structure is defined as Company > Organization > Department, which represents how a company is represented from a business perspective.

► To create the company and organizations

- 1 From the Standard Configuration tab of the Application Administration Console, click the Create link next to Organization.

The Organization dialog box appears.

Figure 9-5: Organization dialog box



- 2 Enter or select the organization.

Enter the name of the organization to create it. After you add the first department to the organization, you can select the organization when you add another department.

- 3 Enter the department.
- 4 Click Add.

You can continue to add organizations and departments.

- 5 When you are finished configuring organizations and departments for the company, click Close.

Creating locations

The Location structure is defined as Company > Region > Site Group and Site, which represents locations of sites. The location structure can be used in group assignment and other mapping functions such as approvals. Sites represent a physical location (such as a building) for a company.

► To create locations

- 1 On the Standard Configuration tab of the Application Administration Console, select the company for which you want to create a location.
- 2 Click the Create link next to Location.

The Location dialog box appears.

Figure 9-6: Location dialog box

- 3 Optionally, enter or select information in the Region and Site Group fields.

You can use the Region and Site Group fields to create a location structure with two or three levels.

- **Region**—Geographic areas can be divided into regions. A company can have several regions, depending on how many sites it has and where the sites are located. Examples of company regions are Northwest, Atlantic, and Pacific. Creating regions under a company is done only for reporting.

Enter the name of a region to create it. After you add the first site group or site to the region, you can select the region when you add another site or site group.

- **Site Group**—Geographic areas can be subdivided into *site groups*, which are collections of individual locations. A company can have any number of site groups, depending on how many locations it has and where the locations are. An example of a company site group is ABC World Headquarters.

Enter the name of the site group to create it. After you add the first site to the site group, you can select the site group when you add another site.

- 4 Enter the site designation in the Site field.
- 5 Enter or select the site address information.

6 Click Add.

You can continue to add regions, site groups, and sites.

7 When you are finished configuring the company locations, click Close.

Creating support groups

The Support Groups structure is defined as Company > Support Organization > Support Group, which represents how a company is structured from a support perspective. Support groups are typically used to assign work.

NOTE

In SRM, support groups are used only by the work order feature.

► To create support groups

1 On the Standard Configuration tab of the Application Administration Console, select the company for which you want to create a support group.

2 Click the Create link next to Support Group.

The Support Group dialog box appears.

Figure 9-7: Support Group dialog box

3 Enter or select information in the Support Organization and Support Group Name fields.

Enter the name of the support organization to create it. After you add the first support group to the organization, you can select the organization when you add another support group.

4 Select the support group role.

The Support Group Role field describes the role that the support group has in the organization. For example, the support group named Internal Support might provide the Help Desk function, while another support group provides Tier 2 support.

5 Click Add.

You can continue to add support organizations and groups.

6 When you are finished configuring support organizations and groups for the company, click Close.

Creating people information

You can create records for both non-support and SRM support staff. Non-support staff members include anyone who is not a member of the IT organization, or does not create or modify records in SRM.

You must set up a login ID and password for anyone with access to the application, aside from guest access. People information also includes each person's company, organization, business and home addresses, desk location, support groups, and selected additional information.

To create SRM support staff, see "Defining SRM support staff" on page 23. For more information about creating users in ITSM, see the *BMC Remedy IT Service Management 7.0 Configuration Guide*.

Creating non-support staff records

You can create non-support staff records for employees, customers, and vendors. Support staff can use these records to complete forms, such as to indicate that a customer who called the help desk to report an incident. If non-support staff have a login ID and password, they can record their own requests on the Request Entry console.

NOTE

For information about guest users, see "Allowing unknown users access to SRM" on page 27.

► **To create non-support staff records**

- 1 On the Standard Configuration tab of the Application Administration Console, select the company for which you want to create non-support staff records.

- 2 Click the Create link next to People.

The People form appears.

Figure 9-8: People form completed for a customer

- 3 Enter the person's first name and last name.
- 4 Select the client type.

NOTE

If you select Office-Based Employee, you must select or enter a site in the Site field. If you select Home-Based Employee, you must enter home information.

- 5 Optionally, you can select a contact type, such as Sales or Technical Support.
- 6 Set Support Staff to No.
- 7 To enter the phone number, click in the Phone Number field and press ENTER. Select a Country Code for a phone number from the list or enter one manually. If you omit the phone number, it is set as unknown.
- 8 Optionally, enter the email address.

NOTE

An email address is required to receive email notifications. For more information, see "Configuring mid tier and multi-tenancy settings" on page 25.

- 9 If this person is a home-based employee, enter the home and address and phone number.
- 10 In the Organization Information area, select the company and, optionally, select the organization and department.
- 11 In the Location Information area, select the site.
You must select a site for employees, but it is optional for customers and vendors.
- 12 To allow this person to log in to the system, perform the following steps on the Login/Access Details tab:
 - a Enter a login ID and password.
People who have access to the People form can change their password.
 - b If this person needs access to applications, see the instructions in “Defining SRM support staff” on page 23.
Non-support staff typically do not need access to applications. In the Request Entry console, they can create and modify requests, and they can access only their own records. If you grant them access to applications and you have multiple companies, however, you might want to restrict their access, as described in “Defining SRM support staff” on page 23.
 - c If required, select a license type of Fixed or Floating.
 - d If you have the AR System full text search option, select the appropriate Full Text License Type.
- 13 Click Add.
- 14 If you entered a login ID and password for this person, you must confirm the password.
You can continue to add people records.
- 15 When you are finished adding people records, click Close.

Creating product categories

You can create product categories for use in various forms. Products can be any items used by an organization and are usually IT-related. Products are typically used to classify a configuration item, an incident, a problem, or a change request.

NOTE

In SRM, product categorization is used only by the work order feature.

The Product Categorization structure is defined as Tier 1 > Tier 2 > Tier 3 > Product Name and Manufacturer > Model Version, which is used to categorize different products or configuration items in BMC Atrium CMDB.

Before creating or modifying product information, it is important to understand product relationships.

- When creating product category information, you must complete all three tiers. The product name or manufacturer field is optional, but both are required if either is specified. One tier can be sufficient, depending on the item being created. If you create a product for which only one tier is required, you can set the other two tiers to None.
- Each product category can have more than one product model/version.
- Products can be associated with one or more companies.

Each product category must be unique. You might find it helpful to view existing categories before creating new categories. For more information about viewing categories, see “Viewing and modifying standard configuration data” on page 193.

► To create product categories

- 1 On the Standard Configuration tab of the Application Administration Console, select the company for which you want to create product categories.
- 2 Click the Create link next to Product Category.

The Product Category dialog box appears.

Figure 9-9: Product Category dialog box

- 3 Select the configuration item (CI) type.

The CI Type field specifies the type of CI for which you are creating this product category.

- 4 Select or enter the Product Categorization Tiers. If you are creating a product that requires only one tier, enter None for the other two tiers.

After you create a product category with a particular tier 1 and tier 2, you can select those tiers when creating additional product categories. For example, if you create a product category for Hardware > Server > Unix, you might first enter all three categories, but when you create a product category for Hardware > Server > Windows, you can select both Hardware and Server.

- 5 Optionally, you can enter or select a product name.

Enter the name of the product to create it. After you create the product category, if this product is produced by more than one manufacturer, you can select the product.

- 6 If you specify a product name, you must specify a manufacturer. Select a manufacturer, or click New to add a manufacturer.

If you click New, the Add New Manufacturer dialog box appears. Enter a company, select Enabled for the status, and then click Save.

- 7 Select Enabled for the status.

NOTE

You can set the status to Proposed to temporarily prevent the category from being selected from an application.

- 8 For the Suite Definition field, select Yes if this product is part of a suite of related products; otherwise, select No.

- 9 Select whether the category is available for the company that you are configuring, or whether it is available for all companies.

If you select All Companies, the category is related to the Global company and is available to all operating and customer companies.

- 10 Click Add.

The operational category is saved and is available on other forms. You can continue to add product categories.

- 11 When you are finished adding product categories, click Close.

Creating operational categories

You can create operational categories of services for use in various forms. Operational categories list all the operational services that a typical help desk provides, such as add user account and change server password. It can also contain items that represent symptoms of incidents or problems, such as application failure and network failure.

NOTE

In SRM, operational categorization is used only by the work order feature.

Each operational category must be unique. You might find it helpful to view existing categories before creating new categories. For more information about viewing categories, see “Viewing and modifying standard configuration data” on page 193.

► To create operational categories

- 1 On the Standard Configuration tab of the Application Administration Console, select the company for which you want to create operational categories.
- 2 Click the Create link next to Operational Category.

The Operational Catalog dialog box appears.

Figure 9-10: Operational Catalog dialog box

- 3 Select or enter an operational category.

After you create an operational category with a particular tier 1 and tier 2, you can select those tiers when creating additional operational categories. For example, if you create an operational category for Add > User > Account, you might first enter all three categories, but when you create an operational category for Add > User > Web Page, you can select both Add and User.

- 4 Select Enabled for the status.

NOTE

You can set the status to Proposed to temporarily prevent the category from being selected from an application.

- 5 Select whether the category is available for the company that you are configuring, or whether it is available for all companies.

If you select All Companies, the category is related to the Global company and is available to all operating and customer companies.

- 6 Click Add.

The operational category is saved and is available on other forms.

When you save the operational category, it is automatically related to the Global company. This makes the operational category available on other forms, for all operating and customer companies.

You can continue to add operational categories.

- 7 When you are finished adding operational categories, click Close.

Creating assignment routing for SRM

You can configure assignment routing so that the system automatically assigns records, such as investigations or change requests, to the appropriate support group. When an application uses the routing order, which is a feature of many of the main ticketing forms, it uses information from the form that it is on to find an assignment entry and select the support group for assignment.

IMPORTANT

For SRM to route the correct assignments when you create a service request, you *must* configure the assignments for the Service Request Assignee, Work Order Manager, and Work Order Assignee. If SRM is integrated with Incident Management or Change Management, make sure that you configure group assignment routing for the Incident Owner or the Infrastructure Change Manager as well. For more information, see “Creating group assignment for SRM” on page 130.

► **To create assignment routing for SRM**

- 1 On the Standard Configuration tab of the Application Administration Console, select the company for which you want to create assignment routing.
- 2 Click the Create link next to Assignment.

The Assignment dialog box appears.

Figure 9-11: Assignment dialog box

The screenshot shows the 'Assignment' dialog box. The title bar indicates it's for 'srm22-vm-01.eng.remedy.com'. The dialog has a 'bmcsoftware' header with a 'Help' button. The main content is divided into sections: 'Event Details' with 'Event*' (Service Request Assignee), 'Description', and 'Assigned Group*' (Internal Support); 'Routing Order' with 'Organization and Location Company' (Company*+ Acme Inc.) and 'Operational Categorization' (Tier 1, Tier 2, Tier 3); and 'Product Categorization' (Tier 1, Tier 2, Tier 3, Product Name). At the bottom are 'Add', 'Clear', and 'Close' buttons.

- 3 In the Event field, select the type of assignment entry.
For SRM, the following assignment entries are applicable:
 - Service Request Assignee (required)
 - Work Order Manager (required)
 - Work Order Assignee (required)
 - Task Assignee (required)
 - Infrastructure Change Manager (required if SRM is integrated with Change Management)
 - Infrastructure Change Assignee (required if SRM is integrated with Change Management)
 - Incident Owner (required if SRM is integrated with Incident Management)
- 4 Select the support group to assign.

- 5 In the Routing Order area, specify when this assignment entry should be used for the automated assignment.
 - **Company**—Select the location of the incident or request. If this routing applies to all companies, select Global.
 - **Operational Categorization**—You can route assignments by operational services.
 - **Product Categorization**—You can route assignments by product categorization.
- 6 Click Add.

You can continue to add assignment routings.
- 7 When you are finished adding assignment routings, click Close.

Viewing and modifying standard configuration data

After you perform standard configuration, you can view the data. When you view the data, a form appears in which you can perform additional custom configuration. For example, if you view support groups, you can use the Support Group form to modify the data already entered or add additional information, such as the business hours for a support group.

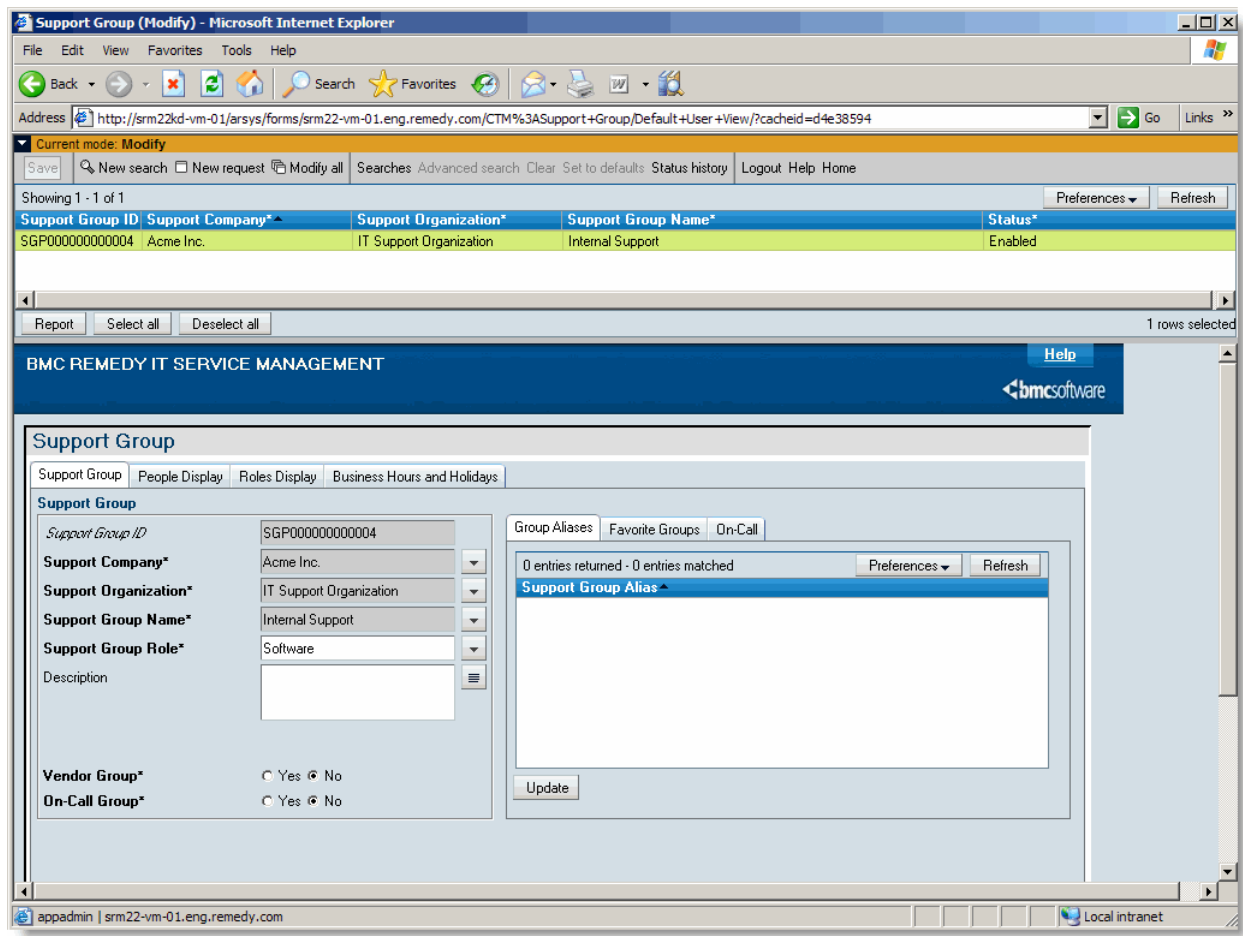
► To view or modify standard configuration data

- 1 On the Standard Configuration tab of the Application Administration Console, select the company for which you want to view or modify configuration data.
- 2 Click the View link next to the standard configuration data that you want to view or modify.

The corresponding form appears with the search results that display all records for the selected company. If appropriate, records applicable to all companies are also listed. For example, if you click the View link next to Support Group, the Support Group form appears, displaying all matching support groups.

The top part of the form displays the search results, and the bottom half displays the selected record.

Figure 9-12: Support Group form displaying the company's support groups



- 3
- Select the appropriate record.
- You can view the data or make changes, as appropriate. For additional information, see the following table.

Table 9-1: Additional information about standard configuration data

Location of View link	Form	Additional information
Configuration for Company	Company form	For additional information about this form, see the <i>BMC Remedy IT Service Management 7.0 Configuration Guide</i> .
Organization	People Organization Update form	<p>You can make updates on this form, such as selecting a different department or typing in the new name of an organization. After you make the changes, click Save.</p> <p>You can also make changes to the company's organizations from the Organization tab of the Company form, as described in the <i>BMC Remedy IT Service Management 7.0 Configuration Guide</i>.</p>

Table 9-1: Additional information about standard configuration data (continued)

Location of View link	Form	Additional information
Location	Site Company Relationship form	<p>Note: You can view the locations for a company from this form, but you cannot make changes.</p> <p>To modify a site, click the Edit Site button from this form. This opens the Site form, which is described in the <i>BMC Remedy IT Service Management 7.0 Configuration Guide</i>.</p> <p>To remove locations from a company, see the <i>BMC Remedy IT Service Management 7.0 Configuration Guide</i>.</p>
Support Group	Support Group form	For additional information about this form, see the <i>BMC Remedy IT Service Management 7.0 Configuration Guide</i> .
People	People form	For additional information about this form, see the <i>BMC Remedy IT Service Management 7.0 Configuration Guide</i> .
Product Category	Product Company Relationship form	<p>Note: From this form, you are limited to enabling and disabling the product category for the company or applications.</p> <p>To modify the product category, click the Edit Product Category button from this form. This opens the Product Catalog form, which is described in the <i>BMC Remedy IT Service Management 7.0 Configuration Guide</i>.</p>
Operational Category	Operational Company Relationship form	<p>Note: From this form, you are limited to enabling and disabling the operational category for the company or applications.</p> <p>To modify the operational category, click the Edit Operational Category button from this form. This opens the Operational Catalog form, which is described in the <i>BMC Remedy IT Service Management 7.0 Configuration Guide</i>.</p>
Assignment Routing	Configure Assignment form	For information about this form, see “Creating group assignment for SRM” on page 130. For additional information about configuring assignments, see “Working with SRM auto-assignment configuration” on page 128.

4 If you make changes to the form, click Save.

5 Close the form.

Chapter 10 SRM permissions and functional roles

This section provides an overview of BMC Service Request Management (SRM) permissions and functional roles.

The following topics are provided:

- SRM permissions (page 198)
- Work order permissions (page 200)
- SRM functional roles (page 200)

SRM permissions

Permission groups are used to grant users access to different consoles and modules within SRM. Permission groups are supplied for the following user roles:

- **Service Request User**—Requester who has been added as a person. No permissions are required.
- **Business Manager**—Requester's manager, as specified in Manager's Name field on the More Details tab of the People form. Requires the Business Manager permission.
- **Entitlement Administrator**—Defines entitlement to SRDs. Has access to Entitlement Console and the Entitlement Group Management form. Requires the Entitlement Administrator permission.
- **Service Catalog Manager**—Defines SRDs and PDTs including entitlement, SLAs, cost and price, approval at the service request level, system-level common offerings, and mappings to the process flow. Requires the Request Catalog Manager permission.
- **SRM Administrator**—Configures SRM and the connection to the backend application, and performs system-level troubleshooting. Requires the SRMS Administrator permission.

The following table describes in detail the consoles and functions that various users and roles can access in SRM 2.2.00.

Table 10-1: SRM permissions

	Types of service request end users		Service Request Management roles				
	Unknown end user	Registered end user	Service Request User	Business Manager	Entitlement Administrator	Request Catalog Manager	SRM Administrator
Consoles							
Request Entry Console	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Business Manager Console	No	No	No	Yes	No	No	No
Service Request Coordinator Console	No	No	Yes	No	No	No	No
Service Catalog Manager Console	No	No	No	No	No	Yes	No
Application Admin Console	No	No	No	No	Yes ¹	No	Yes
Import Export Console	No	No	No	No	No	Yes	No
Functions							

Table 10-1: SRM permissions

	Types of service request end users		Service Request Management roles				
	Unknown end user	Registered end user	Service Request User	Business Manager	Entitlement Administrator	Request Catalog Manager	SRM Administrator
Create or modify service requests for self	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Reopen service requests	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Close service requests	Yes	Yes	Yes	Yes	Yes	Yes	Yes
View broadcasts	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Surveys	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Add more information to service requests	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Cancel service requests	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Approve service requests	No	No	Yes	Yes	Yes	Yes	Yes
Create or modify service requests for others	No	No	Yes	Yes	No	No	No
Cancel other service requests	No	No	Yes	Yes	No	No	No
Define entitlement rules	No	No	No	No	Yes	Yes ²	Yes
Create reports	No	No	Yes	Yes	No	Yes	No
Access SRM Administration or Configuration	No	No	No	No	No	No	Yes
Create or modify SRDs	No	No	No	No	No	Yes	No
System-level troubleshooting	No	No	Yes	No	No	No	Yes

¹. Access to entitlement configuration only.

². Create or modify entitlement rules through Entitlement tab on SRD form.

For information about configuring user permissions in SRM, see “Defining the SRM application administrator” on page 17 and “Defining SRM support staff” on page 23.

Work order permissions

Permission groups are used to grant users access to different work order consoles and modules. Permission groups are supplied for the following user roles:

- Work order configuration—Requires the Work Order Config permission.
- Work order manager—Requires the Work Order Master permission.

For information about configuring permissions, see “Creating people information” on page 185.

The following table provides a broad overview of work order permissions.

Table 10-2: Overview of work order permissions

Permission	Description	Form access
None	No access to create, modify, reopen, and cancel work orders.	Provides no access to: <ul style="list-style-type: none"> ■ Work order rules. ■ Work order templates. ■ Create, manage, and fulfill work orders.
Work Order Config	<ul style="list-style-type: none"> ■ Grants access to create, modify, reopen, and cancel, and approve all work orders. ■ Grants access to reports. 	Provides access to: <ul style="list-style-type: none"> ■ Work order rules. ■ Work order templates. ■ Task templates. ■ Approval Mappings.
Work Order Master	Grants access to modify work orders.	Provides access to create, manage, and fulfill work orders.

SRM functional roles

SRM functional roles are used for notifications and to extend access granted by permission groups. Only support staff members can be given functional roles.

NOTE

For more information on notifications, see “Configuring mid tier and multi-tenancy settings” on page 25.

The following table lists the functional roles defined in SRM and their purposes.

Functional role	Purpose
Request Approver	Identifies support people within support groups as approvers for requests. If a support group has been defined to approve service requests, this role must be granted to at least one individual within the group so he or she can approve service requests.
SRD Approver	Identifies support people within support groups as approvers for SRDs. If a support group has been defined to approve SRDs, this role must be granted to at least one individual within the group so he or she can approve SRDs.

Functional role	Purpose
Work Order Assignee	Grants full access to work orders that are assigned to the assignee's group.
Work Order Manager	Grants full access to work orders that are assigned to the manager's group. This role can be applied to either the Assigned or Manager Group in the work order form.

For information about configuring functional roles, see the *BMC Remedy IT Service Management 7.0 Configuration Guide*.

Appendix

A Using the mid tier pre-fetch utility when configuring SRM

This section describes how to use the pre-fetch utility when configuring SRM.

The following topics are provided:

- Using the pre-fetch utility to preload specified forms (page 204)
- Tips for using pre-fetch utility with Tomcat (page 204)
- Pre-fetch components (page 205)

Using the pre-fetch utility to preload specified forms

Make sure you use the pre-fetch configuration utility with the mid tier when configuring SRM to prevent degradation of performance during loading applications and forms into cache. Loading applications and forms into memory can cause a significant delay for the first user in a “permission type.”

You can use a PERL-based utility (prefetch.pl) to make calls to the mid tier URLs from the command line and therefore off load the performance hit of caching. With this prefetch.pl utility, the cache can be pre-loaded during the mid tier startup.

NOTE

For more information, see the *7.1.00 Installing and Administering BMC Remedy Mid Tier* guide.

Tips for using pre-fetch utility with Tomcat

The more forms you add to prefetch, the longer you need to allow for a graceful shutdown of Tomcat. If Tomcat crashes or the server is shut down before Tomcat has time to save any open prefetch files, the prefetch will start over again upon reboot, leading to slow response and a possible system crash if others try to use it while it is fetching again.

- Increase the Tomcat shutdown time and thread stack sizes to enable the efficient serialization of your forms. This action gives Tomcat extra time to save prefetch files.
- Raise the max memory size of Tomcat, for example, 1024 MB.
- Flush the Tomcat cache. Restart Tomcat, and then let it run. This action could take several hours to finish.
- Monitor the amount of memory actually needed and lower the number accordingly.
- Include *only* the front-end user facing forms in the prefetch.
- Include the user name that is the most common group combination in the prefetch file. Using the Admin user might not be appropriate as the users belonging to other groups would then trigger the HTML generation on the mid tier.
- Watching the Tomcat process to make sure you are not keeping the JVM busy with the memory swap. If possible, allocate the min and max as 2GB so that the Tomcat process starts up with the full memory at hand.

Since the memory requirements are dependent on how many forms that are being loaded, you must calculate the amount of memory needed based on the application stack and the usage of your deployment.

NOTE

For more information on Tomcat configuration settings and the persistent cache option, see the *7.1.00 Installing and Administering BMC Remedy Mid Tier* guide.

Pre-fetch components

The prefetch.pl utility uses the following components:

StartServlet	Contains the main code.
prefetchConfig.xml	Main configuration file found in <code><midtier>/WEB-INF/classes</code> .
prefetchConfig.xsd	XML schema definition (XSD) for the .xml file, found in the <code><mid tier installation></code> folder.

The format of the prefetch.pl utility configuration file is as follows:

Header	<code><?xml version="1.0" encoding="UTF-8"?> <midtier-prefetch-config xmlns="http://www.bmc.com/remedy/midtier/700"></code>
Authentication—One or more users that determines the permission-type cache. No password is required.	<pre> <prefetch-user> <user-name>SupportUser</user-name> <locale>en_US</locale> </pre>
Server, applications and forms—applications can contain 0+ forms. Forms can exist individually at a server level.	<pre> <prefetch-server> <server-name>arserver</server-name> <prefetch-app> <app-name>Sample</app-name> <prefetch-form> <form-name>Home Page</form-name> </prefetch-form> ... </prefetch-app> <prefetch-form> <form-name>Home Page</form-name> </prefetch-form> </prefetch-server> </prefetch-user> </pre>
Footer	<code></midtier-prefetch-config></code>

You should be aware of the following usage issues:

- Forms are cached differently, depending if they are accessed using a call to the application (/arsys/apps/ServerName/AppName/FormName) or the forms directly (/arsys/forms/ServerName/FormName). For environments where either call is possible, both methods should be covered in the .xml file:

```
...
<prefetch-server>
  <server-name>ServerName</server-name>
  <prefetch-app>
    <app-name>AppName</app-name>
    <prefetch-form>
      <form-name>FormName</form-name>
    </prefetch-form>
  </prefetch-app>
</prefetch-server>
<prefetch-server>
  <server-name>ServerName</server-name>
  <prefetch-form>
    <form-name>FormName</form-name>
  </prefetch-form>
</prefetch-server>
...
```

- Specifying an application without at least one form causes the mid tier to cache all of the forms in that application.

```
...
<prefetch-server>
  <server-name>ServerName</server-name>
  <prefetch-app>
    <app-name>AppName</app-name>
  </prefetch-app>
</prefetch-server>
...
```

- You can see the prefetch activity in the mid tier logs in the following situations:
 - The “performance” category is checked

■ The Log Level is set to “Fine”

```

Apr 12, 2007 1:05:57 PM com.remedy.arsys.prefetch.PrefetchTask
run
INFO: START prefetch
Apr 12, 2007 1:06:14 PM com.remedy.arsys.goat.Form get
FINE: Form: Constructing for missing key Form:atlwin01/AR
System User Preference
Apr 12, 2007 1:06:17 PM com.remedy.arsys.goat.Form <init>
FINE: API form time = 2735
Apr 12, 2007 1:06:17 PM com.remedy.arsys.goat.Form get
FINE: Form: Construction for key Form:atlwin01/AR System User
Preference took 2765
Apr 12, 2007 1:06:17 PM
com.remedy.arsys.goat.Form$CachedFieldMap <init>
FINE: Form.CachedFieldMap: Constructing for missing key
atlwin01/AR System User Preference/Admin
Apr 12, 2007 1:06:17 PM
com.remedy.arsys.goat.Form$CachedFieldMap <init>
FINE: API field key time = 31
Apr 12, 2007 1:06:22 PM
com.remedy.arsys.goat.Form$CachedFieldMap <init>
FINE: API field time = 4797
...
...
FINE: Using the preference server atlwin01 form AR System User
Preference for user Demo
Apr 12, 2007 1:06:22 PM com.remedy.arsys.goat.Form get
FINE: Form: Constructing for missing key Form:atlwin01/
Sample:Classes
Apr 12, 2007 1:06:24 PM com.remedy.arsys.goat.Form <init>
FINE: API form time = 2031
...

Apr 12, 2007 1:06:30 PM com.remedy.arsys.goat.field.FieldGraph
instantiateFields
FINE: FieldGraph: Populated fields/workflow for key
Admin|atlwin01/Sample:Classes/536880381/N, took 5438
Apr 12, 2007 1:06:30 PM com.remedy.arsys.goat.Globule init
FINE: Globule: Compressed data type text/html; charset=UTF-8 -
was 17445 bytes, now 3718 bytes
Apr 12, 2007 1:06:30 PM com.remedy.arsys.goat.ActiveLink
getBound
FINE: COMPILE formactivelink time = 0
Apr 12, 2007 1:06:30 PM com.remedy.arsys.goat.ActiveLink
getBound
FINE: COMPILE formactivelink time = 0
Apr 12, 2007 1:06:31 PM com.remedy.arsys.goat.menu.Menu
getMenuFromServer
FINE: API Get Menu time = 421

```

```
Apr 12, 2007 1:06:31 PM com.remedy.arsys.goat.Globule init
FINE: Globule: Compressed data type text/js; charset=UTF-8 -
was 5967 bytes, now 1972 bytes
Apr 12, 2007 1:06:31 PM
com.remedy.arsys.prefetch.PrefetchWorkerImpl fetchForUser
FINE: successful prefetch -
server:atlwin01||form:Sample:Classes||username:Demo||appname:S
ample||view:null||locale:en_US||timezone:null took 8687
milliseconds.
Apr 12, 2007 1:06:31 PM com.remedy.arsys.goat.Form get
FINE: Form: Constructing for missing key Form:atlwin01/AR
Sample Application: Console
...
...
Apr 12, 2007 1:06:31 PM com.remedy.arsys.prefetch.PrefetchTask
run
INFO: END prefetch
```


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A B C D E F G H I J K L M N O P Q R S T U V W X Y Z



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